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Identifying rural touristic preferences: A Case of Orleans County

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**IDENTIFYING RURAL TOURISTIC PREFERENCES:
A CASE OF ORLEANS COUNTY**

by

Rene Corene Rhodey

A thesis submitted to the
Faculty of the School of Food, Hotel and Travel Management
at
Rochester Institute of Technology
in partial fulfillment of the requirements
for the degree
of
Master of Science

August 1991

ROCHESTER INSTITUTE OF TECHNOLOGY
School of Food, Hotel and Travel Management
Department of Graduate Studies

M.S. Hospitality-Tourism Management
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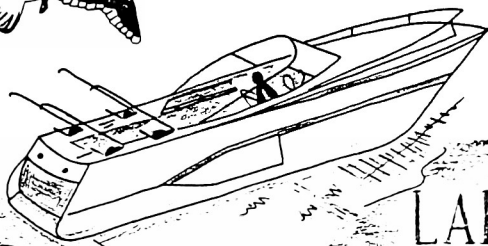
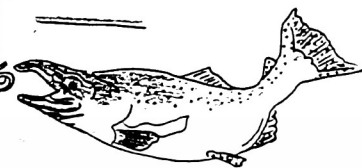
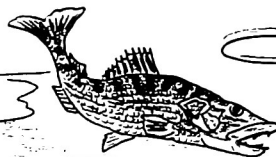
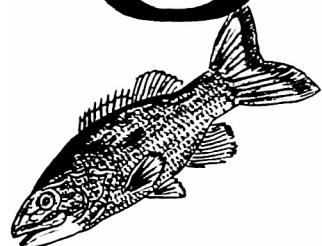
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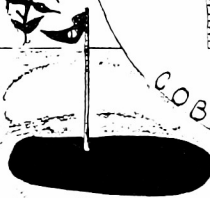
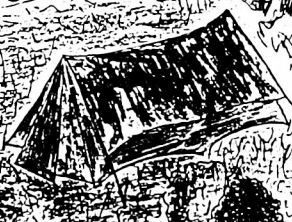
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This thesis is dedicated to my brother, Jeffrey.

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"ALL PEOPLE GO TO WOODS AND WATER!"

Don White, Director of Tourism
Orleans County, New York

CHAPTER I

Introduction

Situated between two metropolitan centers of Buffalo-Niagara Falls, and Rochester and along Lake Ontario exist the rural communities of Orleans County in the Great Lakes Plain of Western New York. Unspoiled by urbanization, this area represents a unique opportunity to assess the role of rural tourism in New York State.

Orleans County offers a wide range of amenities to its visitors, appealing to both the young and old. Both the avid and amateur fishermen come from near and far to experience some of the best salmon and trout fishing on Lake Ontario. There are countless recreational activities to enjoy year round in this rural setting. During the winter months, visitors can participate in cross country skiing, snowmobiling as well as ice fishing. In the spring months, the region is covered in apple and cherry blossoms, while fishermen delight in record-setting salmon and trout fishing. Summers provide opportunities for camping, fishing, golfing, boating, water skiing and relaxed sightseeing. Visitors enjoy Autumn in Orleans County for its farmer's market and fall foliage.

A visit to Orleans County is a cultural experience with the historic Erie-Barge Canal, constructed in the early 19th century, and the Cobblestone Museum. This

complex consists of a home, a church, a school house, a blacksmith and print shop on their original sites, illustrating the unique architecture of the 1800's. The quaint bed and breakfast accommodations that are located throughout the County, enable visitors to experience the true character of the region. Antique and folk art lovers will be in awe of the wide variety of hand-crafted gifts and antiques that can be found throughout the County.

The rural setting of Orleans County also provides visitors an opportunity to enjoy nature at its best at Oak Orchard, Iroquois National or Tonawanda Management Wildlife Refuge that abound with ducks, geese, pheasants, raccoons, deer, beavers fox, cranes, turkeys and other wildlife.

The interest in rural tourism in New York State dates back to the development of resort hotels in the Adirondack Mountains during the mid-nineteenth century and continued with the development of national and state parks. The popularity of the automobile and increased leisure time in the twentieth century have also accelerated the trends for rural tourism development in all sections of the country as an increasingly urbanized population searches for "rural" experiences and attractions. (National Policy Study on Rural Tourism, 1989) Too often tourist destinations are associated with developed costal resorts and larger metropolises. Many tourists, now looking for a "change of pace" from the traditional vacation setting are finding rural destinations, such as Orleans County, just as satisfying.

The U.S. Travel Data Center predicts that "more vacationers are planning summer trips to the mountains or rural destinations and are staying away from big cities". (Dorsey, 1991)

According to Edurado Fayos-Sola (1989), General Director of the Valencia Tourism Institute in Spain, tourism in rural areas has recently become increasingly popular for two reasons:

- (1) The development of tourism activity in rural areas has begun to occur even in the absence of public incentives due to the exhaustion of basic resources in the coastal resort areas and larger cities. Changing consumer's tastes prefer well-preserved environmental surroundings offered in a rural setting; and
- (2) The tourism industry has the ability to stabilize the population and improve standards of living in rural areas by generating income and employment opportunities, but at the same time respect the pre-existing physical and cultural environment.

There is a growing recognition that "Rural America" can rely on travel and tourism as an important tool for rural economic growth and development. Traditionally, these regions with less than fifty thousand inhabitants have relied on farming as a primary source of income, however, now seek means to diversify their

economic base. "Over 60% of all farm families now rely on off-farm income to help support their lifestyles." (Wynegar, 1990)

Tourism is a viable option for Orleans County to generate non-agricultural income. The County can offer travelers a welcome change of scenery with its abundance of tourist amenities and hospitable atmosphere in a rural environment. Yet, to capture any percentage of the tourist market in the future and reap the potential economic benefits, it is essential that the Orleans County fully comprehends and advertises to the tourism markets profiled in this study.

Problem Statement

Orleans County does not have sufficient information to define the various tourist markets which it serves:

- (1) What are the tourist market segments within the tourism infrastructure of Orleans County, New York? and,
- (2) What can Orleans County do to maximize the tourism potential of the region?

Purpose of the Study

The purpose of this study is to: (1) describe the primary and secondary tourist markets of Orleans County, in terms of monies spent, awareness of area tourist attractions, and general demographic characteristics; and (2) estimate

potential tax revenue generated from tourism spending in the County. It is anticipated that this research will lead Orleans County to develop a centralized database to be used as a tourism decision-making tool by County Officials.

Central Question

The central question is: "What are the demographic characteristics of the tourist population attracted to Orleans County?"

Scope and Limitations of the Study

This study is not an attempt to generate a statistical model whereby any host County or tourism agency may develop a strategic marketing plan to attract a certain tourist market to the given locale. Rather, it is an attempt to substantiate the economic and social importance of tourism planning and development to maximize tourism potential for a specific region.

CHAPTER II

Review of the Literature

The Review of the Literature will focus on the geographic location and attributes of Orleans County, New York. This chapter will also examine the parameters typically associated with rural tourism.

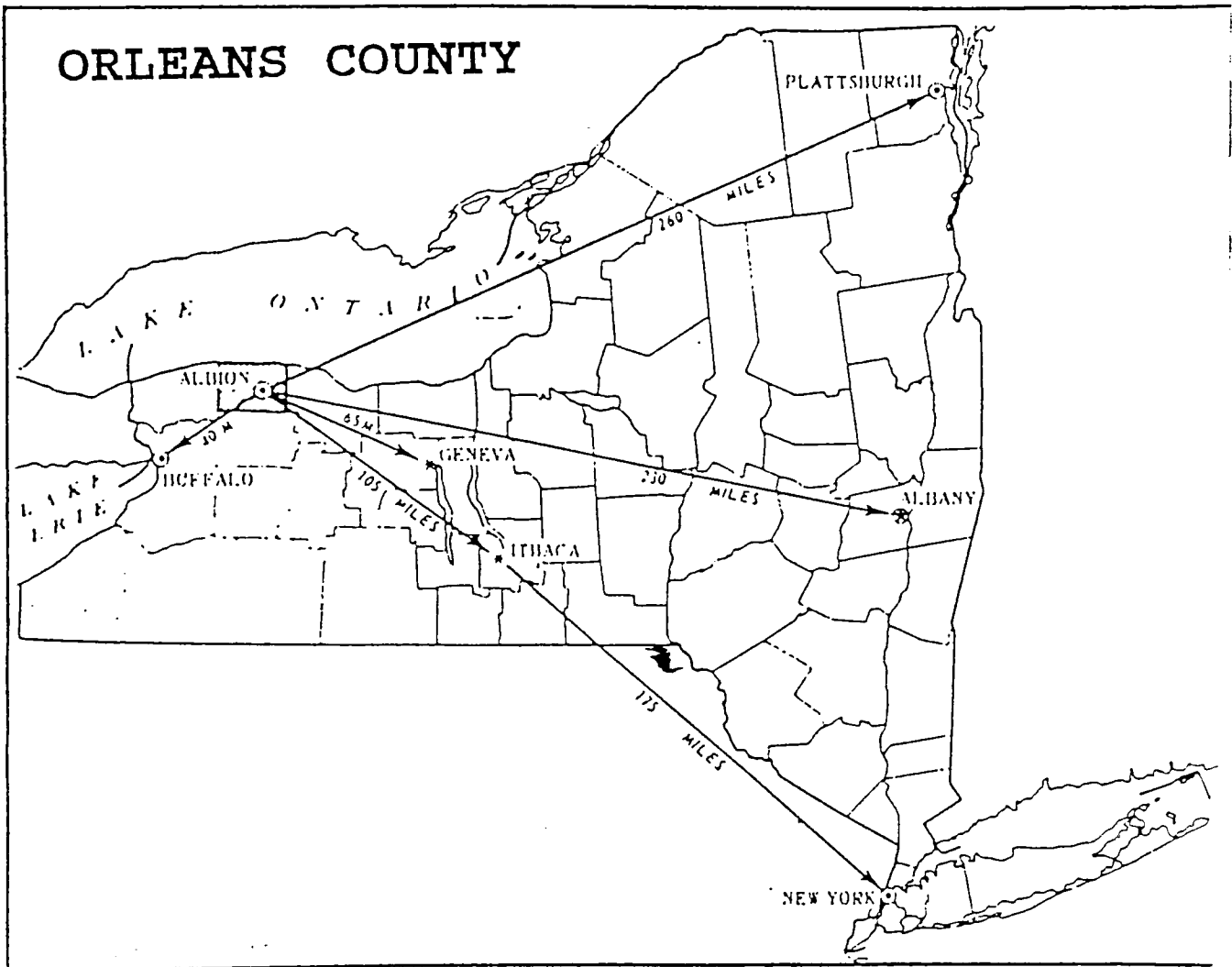
Orleans County

Orleans County, in the northwestern part of New York State, is bordered by the Great Lake of Ontario. Figure 2.01 illustrates the County's location within the State. Named for the French Royal House of Orleans, the County was established as a political unit in November 1824. Originally part of Genesee County that had been obtained from Seneca Indian Territory, Orleans County was settled primarily by persons from the New England States, Eastern New York and Pennsylvania.

The construction of the Erie-Barge Canal through the center of the County was a catalyst in the farming and settlement of the land. The opening of the Canal in November 1825 between Buffalo and Troy, New York resulted in economic changes for Orleans County which was now able to sell farm products in the other parts of the State and foreign countries. With increased navigation on the Canal, small villages such as Albion, Holley, Knowlesville, Medina and others were built on its banks.

FIGURE 2.01

New York State Map



Today, many remnants of Orleans County's yesteryears still exist in this rural community. The Erie-Barge Canal, the Cobblestone Museum Complex, the Court House Square and the Village Inn are examples of how the County's history and character have been preserved over the years.

Orleans County is three hundred ninety-six square miles of rolling plains, or nearly 253,440 acres. The Federal Census of 1990 estimates a total county population of 41,846. Medina and Albion are the principal villages with populations of 6686 and 5863, respectively. Albion, the County Seat, is located in the center of the County while Medina is located in the central-western section of the County. (U.S. Censuses of Population Report, 1990)

The climate in Orleans County is classified as humid-continental. This region is regulated by atmospheric flow and weather systems moving from various parts of the Northern American continent. Moisture is carried to this region from the Gulf of Mexico and the Atlantic Ocean by the major circulation patterns of the atmosphere. The weather is warm and occasionally humid if airflow is from the south or southwest and dry and cold if prevailing winds are from the north or northwest. (Soil Survey, 1977)

Summers in Orleans County are warm with daily high temperatures averaging from the mid seventies to low eighties (Fahrenheit) and daily low temperatures

averaging from the mid-fifties to low-sixties. The temperature does reach into the nineties on a few occasions, but it is not very common. The summer months find an average rain fall of thirteen to fourteen inches. Summer rainfall from thunder-showers is reduced by the moderating influence of the cool waters of the nearby Great Lakes. (Soil Survey, 1977)

Winters in Orleans County are cold and long with daily high temperatures averaging from the low- to mid-thirties and daily low temperatures averaging from the mid-teens to low-twenties. Extreme minimum temperatures of fifteen to twenty degrees below zero have been recorded, but during most winters the coldest temperatures range between zero and ten degrees below zero. The colder months have frequent periods of cloudy, unsettled weather. Snowfall amounts can range from less than thirty-six inches up to ninety-five inches depending on the location in the County. An important factor in the snow climate of the region is Lake Ontario with airflow across its open waters causing substantial snowfall over a wide area and heavy amounts in narrow localized bands. Figure 2.02 details monthly temperature and precipitation data for Orleans County. (Soil Survey, 1977)

The major transportation systems in Orleans County include highways, railroads and the New York State Erie-Barge Canal. The major highways that extend east to west are U.S. Highway 104 and State Route 31 which are the principal connections between Rochester and Niagara Falls, New York. State Route 31

FIGURE 2.02

**Average Daily Minimum and Maximum Temperatures
Average Monthly Rain Fall
in
Orleans County**

MONTH	Average Daily Temperature Maximum (Fahrenheit)	Average Daily Temperature Minimum (Fahrenheit)	Average Monthly Precipitation (Inches)
JANUARY	32	17	2.0
FEBRUARY	33	18	1.9
MARCH	42	25	2.2
APRIL	56	36	2.9
MAY	67	45	3.1
JUNE	78	56	2.7
JULY	83	60	2.9
AUGUST	81	59	2.8
SEPTEMBER	74	52	3.0
OCTOBER	63	43	2.5
NOVEMBER	48	33	3.1
DECEMBER	36	23	2.3

connects the villages and population centers of Holley, Albion and Medina. The Ontario State Parkway is also an east-west scenic highway along and near the shores of Lake Ontario. The Parkway commences in Rochester and concludes at the Lakeside Beach State Park, located along Lake Ontario in Orleans County. Portions of U.S. Highway 104 and the Ontario State Parkway in Orleans County are affiliated with the scenic route across New York State along Lake Erie, Lake Ontario and the St. Lawrence River, known as the SeaWay Trail.

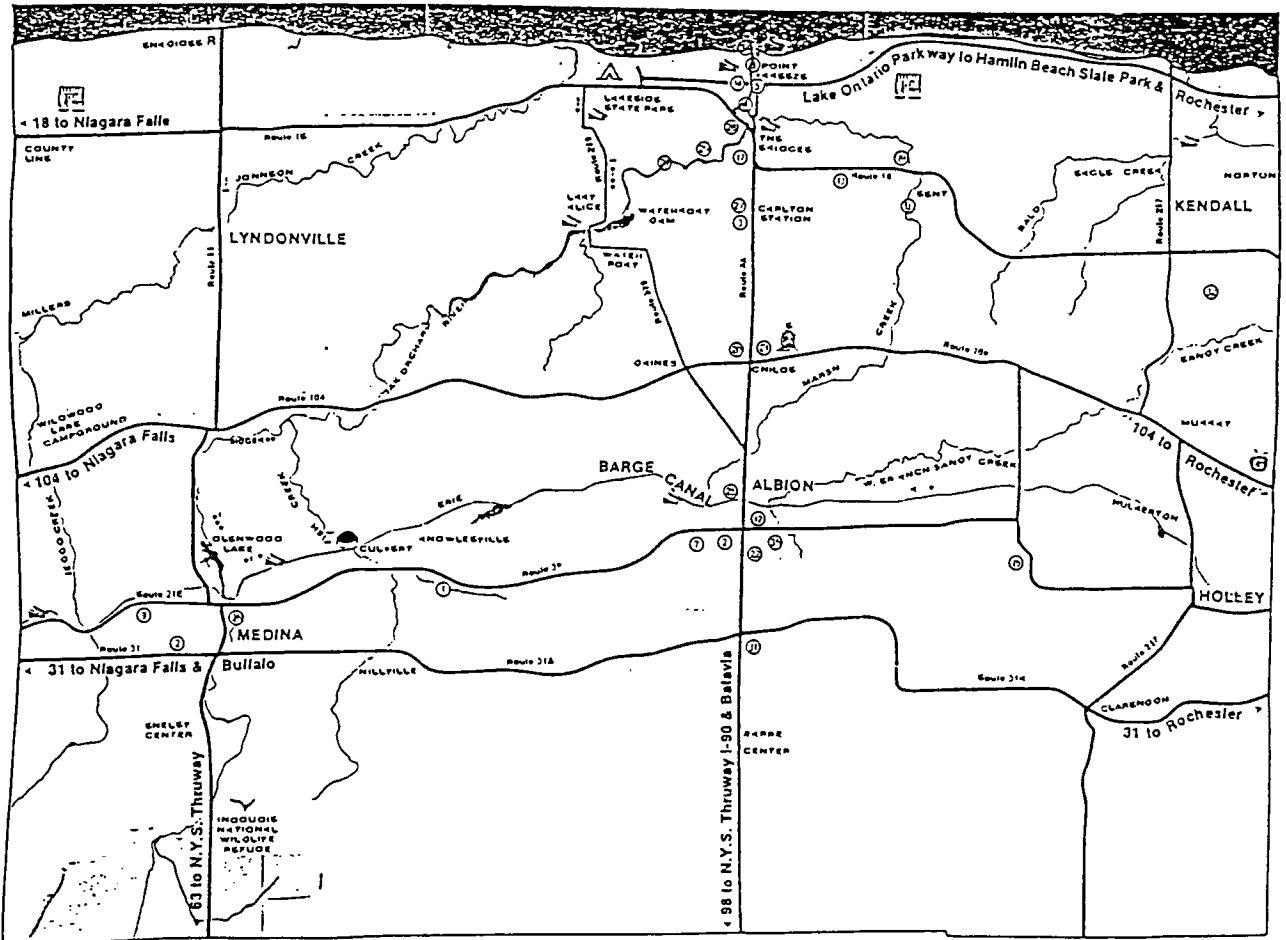
The major highways extending north-south in Orleans County include State Route 98 and State Route 63. State Route 98 connects Albion with the New York State Thruway (Interstate 90) at Batavia, a city in the neighboring County of Genesee. State Route 63 connects Medina with Batavia as well.

A major railroad extending east-west, crosses through the center of Orleans County joining the villages of Holley, Albion, and Medina. The New York State Erie-Barge Canal also connects these villages and is used for commercial and recreational purposes. Figure 2.03 is a map identifying the various transportation systems in Orleans County.

Farming is the principle industry in Orleans County. The favorable climate, the large acreage of soil suitable for farming, and the excellent markets contribute to a diversified and prosperous farming area. The moderate temperatures, long

FIGURE 2.03

Map of Orleans County, New York



frost-free periods, and good soils help make Orleans County an outstanding area for growing fruits and vegetables. Other important crops include dairy products and grain. (Soil Survey, 1977)

In 1969, sixty-five percent of the land, or nearly 164,700 acres in Orleans County was farmed. The number of farms has been declining since 1964. (Soil Survey, 1977) According to the 1988 County and City Data Book, Orleans County still farms nearly sixty percent of its land or approximately 153,00 acres; the average farm size in Orleans County is 239 acres. Of the 642 farms that exist in Orleans County:

- * 25.4% are less than 50 acres;
- * 62.3% are between 50-499 acres; and
- * 12.3% are 500 acres and greater.

(Census Bureau County and City Data Book, 1988)

Other enterprises in the county include manufacturing establishments with total annual earnings of nearly forty-seven million dollars. The retail trade industry in the County, which includes general merchandise stores, food stores, apparel and accessory stores, and eating/drinking places, records total annual earnings of fifteen million dollars. The taxable service industries, such as lodging establishments (hotels, motels, bed and breakfasts, campgrounds), health services (except hospitals) and legal services, record total annual earnings of twenty-three million dollars. These

industries prove to be of substantial importance to the County's economic survival when compared to farming's total annual earnings of fourteen million dollars. (Census Bureau County and City Data Book, 1988)

Tourism has been officially recognized as a legitimate industry in Orleans County since 1986 when the County Legislature established the "Tourism Agency of Orleans County" whose primary responsibility was to coordinate the tourism functions of the County.

In the late 1970's and early 1980's, charter captains providing fishing excursions on Lake Ontario, began promoting Orleans County at various sport shows around the Mid-Atlantic Region, which later evolved to form the Fishery Committee. At that time, several Chamber of Commerce in the County were also promoting tourist activities for their respective villages. In an effort to consolidate the promotional efforts of the various organizations, the County Legislature established the Tourism Agency with a Director of Tourism effective January 1, 1987. Once established, the Tourism Agency formed a Tourism Advisory Board consisting of individuals from various sectors of the community, not exclusively local leaders in the tourism industry. The Tourism Agency was charged with identifying and profiling the tourist amenities within the County. Figure 2.04 is an inventory of tourist-related facilities that exist in the Orleans County and contribute to its tourist appeal.

FIGURE 2.04

Inventory of Tourist Related Facilities in Orleans County

HOTEL/MOTEL ESTABLISHMENTS	10
HOTEL/MOTEL ROOMS	119
COTTAGES	4
COTTAGE ROOMS	15
BED & BREAKFAST ESTABLISHMENTS	12
BED & BREAKFAST ROOMS	27
CAMPGROUNDS	9
CAMP SITES	1135
EAT & DRINK ESTABLISHMENTS	59
MARINAS	11
MARINA SLIPS	505

*Per Conversation With Mr. Don White, Director of Tourism (July, 1991)

Rural Tourism

Defining tourism and the parameters of rural tourism as an industry is no easy task. The definition of this concept truly depends on the source. Don White, Director of Tourism in Orleans County, regards tourism as whatever he limits his definition of it to be. He states that tourism affects and is affected by so many things in Orleans County. (LaLopa, 1989)

The Dictionary of Hospitality, Travel and Tourism (1990) indicates that the term "tourism" is variously defined as:

- (1) The relationship and phenomena associated with the journeys and temporary visits of people traveling primarily for leisure and recreation;
- (2) A subset of recreation; that form of recreation involving geographic mobility; and/or
- (3) The industries and activities that provide and market the services needed for pleasure travel.

Authors McIntosh and Goeldner (1986) contend that to define tourism and to fully describe its scope, the various groups that participate in and are affected by this industry must be considered. For the purposes of this study, tourism may be defined as:

"the sum of the phenomena and relationships arising from the interaction of tourists, business suppliers, host governments, and host communities in the process of attracting and hosting these tourists and other visitors." (McIntosh & Boeldner, 1986)

What needs to be established are the parameters that delineate "rural tourism" as a separate discipline. The Dictionary of Hospitality, Travel and Tourism (1990) cites rural tourism to be the "type of tourism that bases its appeal and offers services on some aspect of the real or imagined rural, non-urban way of life: the vast, quiet, unrushed countryside, varieties of trees and animals and so forth."

The Federal Task Force on Rural Tourism recommended that the Tourism Policy Council amend its definition of tourism as it relates to rural communities. The Council notes:

"Visitors who stay less than one night in the place visited or who travel less than 50 miles from home may, nevertheless, use the services of a tourism-related, rural small business. For example, they may visit a county fair, tour a winery, shop at an inn, or participate in an U-pick or cut-your-own Christmas tree outing." (National Policy Study on Rural Tourism, 1989)

However, the Task Force agreed that this definition is too restrictive when dealing with rural tourism and has recommended that the following definition be substituted for the term "rural tourism":

"A visit by a person to any place other than his or her usual work or home environment and that is outside a Standard Metropolitan

Statistical Area, when exercising in an activity other than one remunerated in the place visited. The purpose of such a visit may include pleasure, business, study, health or religion." (National Policy Study on Rural Tourism, 1989)

Rural tourism has also been associated to some degree with the recent phenomenon of "green tourism". Professor Tony Travis of the University of Birmingham defined green tourism "as people away from their usual habitat in pursuit of leisure activities in the countryside in a manner that will benefit, rather than harm the rural setting". (Jones, 1987) Green tourism provides an opportunity to meet the changing needs of rural communities, to promote better rural conservation, to entertain and inform urban dwellers about the countryside and to respond to the market demands for new tourism products and experiences. (Jones, 1987)

The fact remains that the interest in tourism of rural areas has increased over the last decade as travelers search out recreation in open rural areas rather than congested and busy hotel resort areas. (Fayos-Sola, 1989)

For the purpose of this study, rural tourism is interpreted using the McIntosh's and Goeldner's (1986) definition of "tourism", however, qualifying it with the definition of Rural America:

"the sum of the phenomena of relationships arising from the interaction of tourists, business suppliers, host governments, and host communities of less than fifty-thousand inhabitants in the process of attracting and hosting these tourists and other visitors."

Why develop rural areas? The main reason according to A.W. Glig, is to make the area "more efficient and prevent economic decline". He argues that rural economies are primarily based on agricultural production which is an industry susceptible to violent fluctuations. Tourism provides an opportunity to diversify the rural area's economy as well as offer a more stable basis for income generation. (Gilbert, 1989)

Economic planners say that new industries must be developed to replace those that are dying and are no longer competitive, that underdeveloped rural resources must be utilized, and rural Americans must be taught new skills. Rural communities are seeing the need to seek economic development alternatives to the once-dominated industries of farming, ranching, and mining. Many look to their own attractiveness as potential for tourism development, often based upon the area's culture, historic, ethnic, and geographic uniqueness. (Edgell, 1990)

Rural areas with wildlife, forests, and water resources may find opportunities for guided scenic tours, hunting and fishing trips, or nature interpretation hikes. Rural tours may include demonstrations of life and crafts of an earlier era. (Gunn, 1988)

Rural environments have vast expanses of land and water and wide diverse topographies (mountains, plains, forests, grasslands, and deserts) that provide outstanding settings for tourism and recreation. Local benefits from tourism are usually in such categories as employment, income, diversification of economic base, tax revenues, visibility, and/or cultural benefits. (Edgell, 1990)

Rural tourism development is the planned use of resources for a countryside area which will lead to an increase in the general welfare of the environment, the community and the visitor. (Fayos-Sola, 1989)

It is essential that rural communities recognize their tourism potential by identifying their resources, establishing an organizational structure, and planning a tourism industry compatible with their resources and interests. (Weaver, 1990)

A quality tourism product requires careful planning to ensure that the demand and supply components are equally available. If tourists like a tourism product, the host community can reap the benefits. But without a clear plan for tourism development, the economic benefits may be short-lived. (Edgell, 1990)

A measurement of tourism's economic impact on a rural community is often interpreted by the multiplier effect. It is defined by the following formula (Walsh, 1986):

$$\text{MULTIPLIER} = \frac{\text{DIRECT} + \text{INDIRECT EFFECTS}}{\text{DIRECT EFFECTS}}$$

Direct effects are the sales of businesses from which tourists purchase goods and services. An example of a direct effect is a tourist who purchases a souvenir from a local craft shop. Indirect effects are not as easily identified. A simpler definition of the multiplier states:

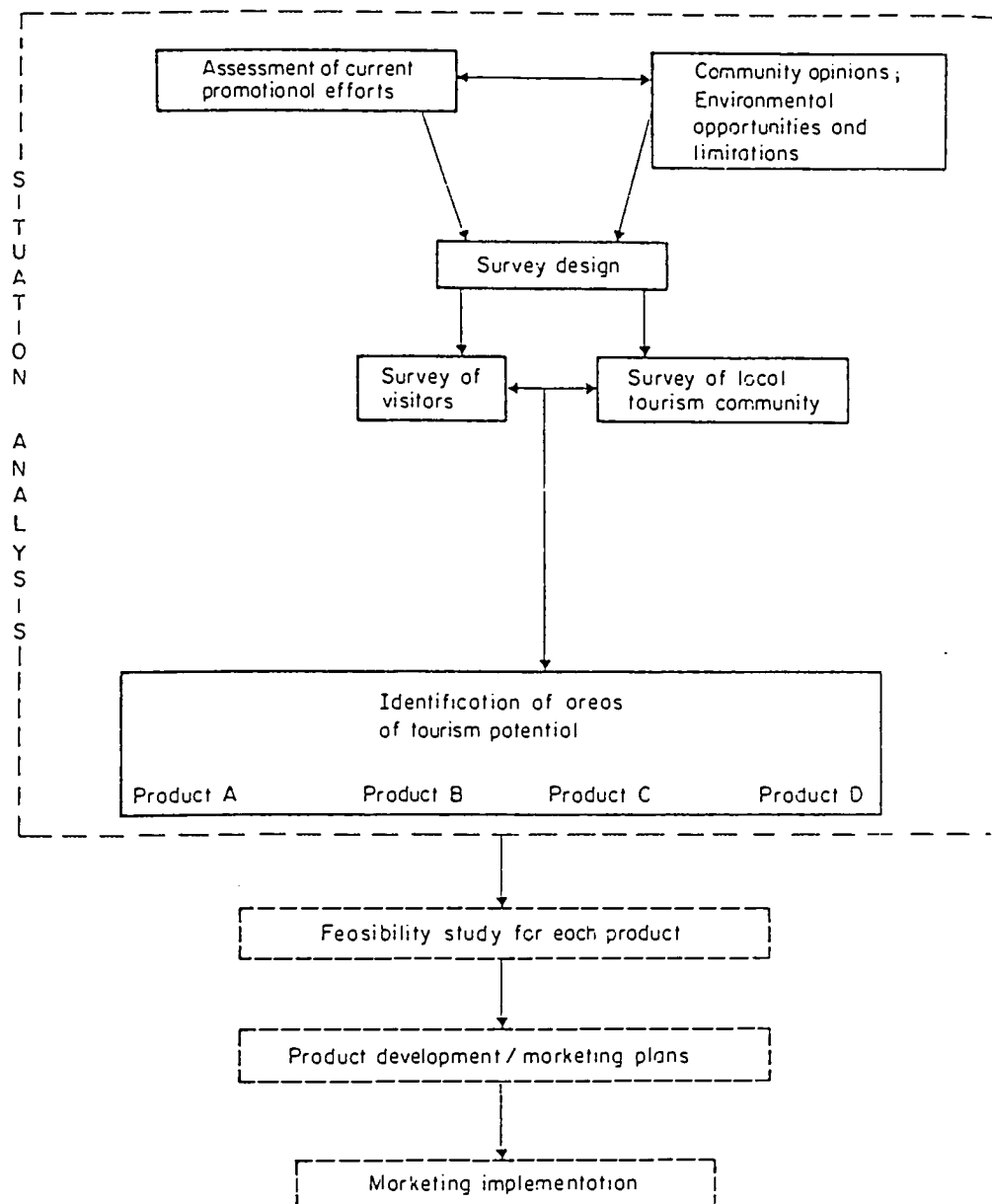
"the effect of the sales of businesses in the region, as a portion of the tourist dollars are spent and re-spent, leading to a multiple increase in the sales of all businesses in the region." (Walsh, 1986)

In an effort to enhance the economic development of rural communities, many areas are adopting tourism as a means to do so. One such case study involves Wise County, located in the south-western area of the State of Virginia. The County, characterized by wooded mountains, pastures and streams, traditionally relied on coal mining as the major source of employment in the region. With the decline in coal consumption and high unemployment rates, Wise County considered tourism as an economic alternative. (Chon and Evans, 1989) The overall tourism planning process used by Wise County, Virginia is illustrated in Figure 2.05.

A Travel and Tourism Committee was established to conduct a situation analysis of the area's tourism potential. This process is outlined by five key steps:

FIGURE 2.05

Tourism Planning Process Model Employed by Wise County, Virginia



- * profiling tourism resources
- * survey visitors
- * survey community leaders
- * identifying potential tourism features
- * applying the results

Profiling Tourism Resources

First, areas considered conducive to tourism development by the local tourism community were identified and profiled. Second, focus groups of local tourism leaders were assembled to establish the benefits and costs of developing tourism in the Wise County area. This group also discussed reasons why people traveled to the area and what are the characteristics of typical visitors to Wise County. The information obtained from this process was then used to develop a survey instrument to be administered to visitors to the area. (Chon and Evans, 1989)

Survey the Visitors

The purpose of the survey was to identify: (1) features which visitors considered important in traveling to the area; (2) visitor's perceptions regarding quality of the areas tourist attributes which visitors identified as being important in traveling to the area; and (3) visitor's sociodemographic characteristics and other potential tourist attracting features in the area. Respondents were first asked to rate

items considered important reasons to travel to the area, then, rate those items in terms of performance and quality. (Chon and Evans, 1989)

Two approaches were used to survey visitors to the area. First, surveys were mailed to names of visitors that were randomly selected from hotel registration cards. Second, on-site surveys were administered to non-local visitors attending arts and crafts festivals held in the area. (Chon and Evans, 1989)

Survey Community Leaders

Those persons who participated in the focus group sessions were also administered the same survey as visitors to the area. The goal was to compare and contrast the perceptions held by local tourism leaders regarding the performance and quality of their own area's tourism attributes with those held by visitors. (Chon and Evans, 1989)

Brenda Witter advises communities to avoid the "proud parent syndrome" with respect to the local tourism leaders believing their region is the "prettiest, has the best attractions and offers the best accommodations", much like proud parents who believe only the best about their child. This "syndrome" is one factor which can obstruct tourism development and promotion in any community. (Witter, 1985)

The results of both surveys indicated that the local tourism leaders in Wise County rated seventy-percent of the tourism attributes lower, or less favorably than the visitors, contrary to Witter's advisory. Chon and Evans conclude:

"This seems to indicate that the local community does not fully appreciate the attraction that their area holds for tourists, a trait that is quite common in areas where tourism has never been developed as an industry." (Chon and Evans, 1989)

Potential Tourism Features

This portion of the visitor's survey included questions relating to the traveler's interest in potential tourism attractions in Wise County. Activities and attractions sought to be of tourism potential by the original focus group were rated by the visitors. The survey also asked respondents to express their opinions and concerns when traveling to Wise County. (Chon and Evans, 1989)

Application of Results

Based on the findings of the situation analysis, Wise County decided to proceed with tourism development in the area. Several immediate steps were taken to foster the development:

- * correct negative aspects of the area identified by the study;
- * initiate feasibility studies for the potential tourism attractions identified by the study;

- * design tourism marketing plans based on the areas existing strengths;
and,
- * launch a tourism-awareness program to enhance the residents awareness of the area's tourism potential. (Chon and Evans, 1989)

Chon and Evans propose that the tourism development process employed by Wise County is applicable to similar rural areas wishing to adopt tourism as a means of bolstering the local economy.

SUMMATION

The Review of the Literature acknowledges rural tourism as a distinct discipline of study, therefore supporting the fact that the development of tourism in rural communities does require separate treatment, different from the more traditional vacation destinations.

CHAPTER III

Methodology and Research Design

The focus of this chapter will be on the methodology employed in this present study. There are three similar survey instruments applied in this study. The first survey was administered to individuals who requested tourist information from Orleans County from either a telephone or written request. In the study, this survey instrument is referred to as the Potential Market Survey.

The second survey was administered to Orleans County tourists prior to July 1990 who either: (a) registered at a campground in the County, (b) registered at a bed and breakfast, hotel or motel in the County, or (c) registered for a fishing license in the County. In this study, the survey instrument is referred to as the Historical Market Survey.

The third survey was administered to Orleans County tourists during the summer months of July and August 1990 who either: (a) registered at a campground in the County, (b) registered at a bed and breakfast, hotel or motel in the County, (c) registered for a fishing license in the County, or (d) visited a County attraction or event. In the study, this survey instrument is referred to as the Current Market Survey.

The research design for the survey instruments consists of essentially three distinct treatments: 1) the development of research instruments; 2) the sampling procedures and administration of the instruments; and, 3) identification of the methodology and statistical procedures to be used in the analysis of the resultant data.

The Development of Research Instruments

A survey instrument was developed for each set of data, the potential, historical and current markets, to address the economic and market issues that will allow Orleans County to maximize the tourism potential of the region. Each of the survey instruments consisting of twenty-two close-ended questions, was designed to reveal specific market and economic information about Orleans County tourists.

The initial survey design is based on research completed in 1980 by the Buffalo area Chamber of Commerce, who conducted a tourism study in Erie County, New York. The purpose of the Erie County Tourist Study was "to describe the tourist that visited Erie County in terms of monies spent, awareness of area attractions, and general demographic characteristics, in an effort to obtain information that would be valuable in targeting future programs geared to the development of this industry." (Erie County Tourist Report, 1980) The primary objectives of the Erie County Tourist Study directly related to the purpose of this research and therefore sixteen questions from the report were adopted.

However, more precise information regarding spending patterns of tourists in Orleans County was needed which required the expansion and addition of certain questions relating to tourist spending. These questions sought to explore where tourist dollars were spent as well as how much. Therefore, the question relating to dollars spent were separated into five categories: accommodations, meals, transportation, attractions and events, and personal items.

In examining the tourist market of Orleans County, the research needed to reveal the "history" of Orleans County tourists. Were they prior visitors of the region and therefore more familiar with the amenities offered by the County, with a pre-determined budget based on past visits? Or, were they visitors "experiencing" Orleans County for the first time? The demand for this information required the additional question of asking visitors how many times they have been to Orleans County. A question regarding the overall satisfaction level the visitors had during their stay in Orleans County was also included in the survey.

Three survey instruments were designed to address separate touristic markets: potential, historical and current. The initial intent of the Potential Market Survey was designed to identify market characteristics of "would be" visitors to the County who had previously requested tourism information. However, upon request of the Orleans County Department of Planning and Development, the cover letter for the Potential Market Survey asked only those persons who had actually visited the

County to respond to the survey. Persons who had not visited the County were asked to respond "Did Not Visit" on the bottom of the cover letter.

The Historical Market Survey asked visitors to respond in terms of their past visit(s) to Orleans County, while the Current Market Survey asked visitors to respond in terms of their present visit to the County. Each of the surveys are identical in format and content except for the verb tense used in each question.

The following is a break down of the individual questions contained in the survey instrument and the rationale for eliciting the responses:

Question 1 sought to establish the nature of the tourist party visiting Orleans County. Was the tourist traveling with immediate family, a group of relatives, a group of friends, business associates, other tour members, or was the tourist traveling alone? The importance of this response will assist in identifying the most common tourist group to the County. Respondents were asked to select the one best response.

Question 2 sought to establish the number of tourists that constitute the party in Question 1. The importance of this response will clarify the average group size visiting the County.

Question 3 sought to establish the residency of the tourist responding to the survey. The importance of this response will identify from what city, state/province and postal code region of the United States and Canada is Orleans County attracting the most tourists. The response to this question will have a direct impact on the tourism marketing and advertising efforts of the County.

Question 4 sought to establish the marital status of the tourist responding to the survey. Selections for this question include single, married, separated, divorced and widowed. The importance of this response will help clarify the nature of the tourist's visit to the County in relation to the responses in Questions 1 and 2.

Question 5 sought to establish the number of dependents belonging to the tourist responding to the survey. The importance of this response will help clarify the nature of the tourist's visit to the County in relation to the responses in Questions 1, 2 and 4.

Question 6 sought to establish the occupation of the tourist responding to the survey. The importance of this response will identify the tourist's nature of employment. Occupation selections include professional, manager-administration, agriculture, manufacturing, transportation, retail, craftsman, self-employed, sales work, government, clerical, student, retired and not employed. A miscellaneous or

"other" response is included for tourists who do not identify with the above selections. Respondents were asked to select the one best response.

Question 7 sought to establish the tourist's purpose of stay in Orleans County. Was the tourist motivated to visit Orleans County on vacation or business? Likewise, was the tourist motivated to visit Orleans County to visit family and/or friends or to attend a specific event held in the County? The question also allowed respondents to identify miscellaneous or "other" reasons for visiting Orleans County. Respondents were asked to select the one best response.

Question 8 sought to establish the tourist's length of stay in Orleans County. Less than one day, one to three days, three to five days, five to seven days, and greater than one week were the selections available to the respondent. The importance of this response will affect the average monies spent in the County on accommodations, meals, transportation, attractions and events, and personal items.

Question 9 sought to establish two factors: (a) Is Orleans County the tourist's primary destination or a stopover? and (b) If Orleans County is a stopover, what is the tourist's primary destination? The importance of these responses will indicate whether or not Orleans County offers substantial tourist amenities to draw more than the transient tourist.

Question 10 sought to establish the type of accommodations utilized by the tourist while staying in Orleans County. The importance of this response will indicate accommodation preferences of tourists visiting Orleans County. Tourist accommodations available in Orleans County include campgrounds, bed and breakfasts, hotels, motels, family, and friends. This question also included a response "not staying in Orleans County" for those survey respondents not requiring accommodations. Respondents were asked to select the one best response.

Question 11 sought to establish the means of transportation utilized by the tourist to reach Orleans County. The importance of this response will indicate transportation preferences of the tourist visiting Orleans County. Transportation options include personal vehicle, rental vehicle, bus, airplane, or train. Survey respondents were asked to select as many transportation options that applied to their visit to Orleans County.

Question 12 sought to establish the sources utilized by the tourist to obtain information on Orleans County. The importance of this response will have a direct affect on the tourism marketing and advertising efforts of the County. The selection of sources included mailed requests, magazines-brochures, information booths, friends/relatives, travel agents, automobile clubs, the Orleans County Travel Guide and the Niagara Region Travel Guide. Survey respondents were asked to select all

of the sources used to obtain information on the County. The question also included a response for those tourists not utilizing any of the sources listed on the survey.

Question 13 sought to establish the tourist's awareness of various attractions in Orleans County. The importance of the response will indicate the success of the tourism marketing and advertising efforts of the County. Respondents were asked to identify all the attractions that they were aware of, which included Canal Packet Boat Tour, Erie Canal, Apple Grove Inn, Cobblestone Museum, Seaway Trail, historic Court House Square, wildlife refuges and trails, scenic waterways and byways, Historic Village Inn, historic locations, festivals, boating, camping, fishing, and hunting activities. The survey includes a miscellaneous or "other" response for activities the tourist was aware of, yet are not mentioned on the survey.

Question 14 sought to establish which of the activities or attractions the tourist participated in or visited while staying in Orleans County, in relation to the activities or attractions that the tourist identified in Question 13. The importance of this response will indicate the advertising success of activities or attractions that are promoted to tourists versus the actual activities and attractions that the tourist participates in or visits.

Question 15 sought to establish the annual household income of the tourist responding to the survey. The importance of the response will clarify characteristics

of the typical tourist who is attracted to Orleans County. Respondents were asked to select an income range from under \$20,000, \$20,001 - \$30,000, \$30,001 - \$40,000, \$40,001 - \$50,000, \$50,001 - \$60,000, \$60,001 - \$70,000, \$70,001 - \$80,000, or over \$80,000.

Question 16 sought to establish the average expenses allocated per day, per tourist party for accommodations in Orleans County. The importance of the response will estimate potential County revenue generated from tourist accommodations. Respondents were asked to select an accommodation expense range from less than \$15, \$16 - \$30, \$31 - \$45, \$46 - \$60, \$61 - \$75, or more than \$76. Increments of \$15 are used to cover the range of accommodation rates charged in Orleans County. This question also includes a response for those tourists whose accommodation expense is included in the price of a tour.

Question 17 sought to establish the average expenses allocated per day, per person for food (breakfast, lunch, dinner, snacks) in Orleans County. The importance of the response will estimate potential County revenue generated from food-service operations. Respondents were asked to select a food expense range from less than \$5, \$6 - \$10, \$11 - \$15, \$16 - \$20, \$21 - \$25, or more than \$25. Increments of \$5 are used to cover the range of food/meals costs in Orleans County.

Question 18 sought to establish the average expenses allocated per day, per party for transportation, including gas and tolls, purchased in Orleans County. The importance of the response will estimate potential County revenue generated from transportation-related operations. Respondents were asked to select a transportation expense range from less than \$5, \$6 - \$10, \$11 - \$15, \$16 - \$20, \$21 - \$25, or more than \$25. Increments of \$5 are used to cover the range of transportation costs in Orleans County.

Question 19 sought to establish the average expenses allocated per day, per person on attractions and events, including entrance fees, charter and licensing fees purchased in Orleans County. The importance of the response will estimate potential County revenue generated from attractions and events. Respondents were asked to select an attraction and event expense range from less than \$5, \$6 - \$10, \$11 - \$15, \$16 - \$20, \$21 - \$25, or more than \$25. Increments of \$5 are used to cover the range of attraction and event costs in Orleans County.

Question 20 sought to establish the average expenses allocated per day, per person on personal items, including souvenirs, recreation equipment and sundries purchased in Orleans County. The importance of the response will estimate potential County revenue generated from personal items purchased by tourists. Respondents were asked to select a personal item expense range from less than \$5, \$6 - \$10, \$11

- \$15, \$16 - \$20, \$21 - \$25, or more than \$25. Increments of \$5 are used to cover the range of personal items expenses in Orleans County.

Question 21 sought to establish the tourist's overall satisfaction with their stay in Orleans County. The importance of the response will determine the County's ability to satisfy its tourists. The respondents were asked to rate their stay in the County on a scale from one to ten, one being the lowest possible score and least satisfying, ten being the highest and most satisfying.

Question 22 sought to establish the number of times the respondent has visited Orleans County. The importance of the response will reveal the "history" of the Orleans County tourist. Were they prior visitors of the region and therefore more familiar with the amenities offered by the County, with a pre-determined budget based on past visits? Or, were they visitors "experiencing" Orleans County for the first time?

Sampling Procedures and Administration of Survey Instrument

The respondents were selected differently for each of the three survey instruments. Survey candidates for the Potential Market Survey were persons who sought tourism information from Orleans County either from the telephone or by a written request. Potential tourists were logged in a computer database by the

Orleans County Department of Planning and Development. All 1,500 persons on the database listing were mailed a survey.

The Historical Market Survey employed a different sampling procedure. To acquire 1,500 previous visitors to Orleans County, names of guests were collected from lodging and campground registrations, and fishing license registrations. Five hundred names from each segment were collected at random from the respective registration cards.

The Current Market Survey instrument was distributed to various lodging and campground establishments as well as fishing license registration locations. Visitors were asked to complete the survey at the time of registration. Two-hundred fifty surveys were distributed to each of the segments. In addition, two-hundred fifty surveys were available at various County events and attractions. The total Current Market Survey aimed to collect 1,000 completed surveys.

Statistical Methodology of Orleans County

Survey Tourism Instruments:

A variety of statistical analyses are to be performed on the resultant data collected from each of the survey instruments. First, an analysis of response rates across all of the survey collected was performed. The SPSSx program was used to

generate means and mode analysis in addition to the standard deviations from the input data collected by the Orleans County tourism survey instruments.

Second, a crosstab analysis was performed, with the SPSSx Program, to establish potential relationships among several variables.

Third, a factor analysis was performed with the SPSSx Program to determine any underlying constructs resulting from the principle components analysis on the resultant data.

CHAPTER IV

Data Analysis and Findings

In this chapter the findings will be addressed. The presentation of the findings will center upon three statistical methods. All the statistical work in the results section of this thesis were generated on the VAXC system at the Rochester Institute of Technology Computer Lab. First, the mean and mode response, as well as the standard deviation of the survey instruments was evaluated. Second, a crosstabs analysis of the survey instruments was performed and discussed. Third, a factor analysis was performed and discussed on the survey instruments.

Descriptive Statistics of the Sample

Of the 4,000 surveys administered to the three tourist populations, 1,361 were returned. Of the 1361 surveys collected, 1,000 were considered appropriate in establishing the data base for this portion of the study. Of the 1,500 surveys submitted to the Potential Market, 669 or 44.60% of the surveys were returned. (The 355 respondents indicating "Did Not Visit" on the Potential Market Survey were not deemed admissible for the database, however were tallied to compute the survey response rate.) Of the 1,500 surveys submitted to the Historical Market, 562 or 37.47% of the surveys were returned. Of the 1,000 surveys distributed in the County to the Current Market, only 130 or 13.00% of the surveys were collected. The overall response rate for the three survey instruments was 34.03%.

The decision was made to aggregate the results of all three surveys based on the following rationale: (1) Upon request of Orleans County, the Potential Market Survey asked only those persons requesting information from a mailed or telephone request who had actually visited the County to respond to the survey rather than those who were intending to visit the County in the future. Consequently, this survey instrument produced similar results to the Historical Market Survey; and (2) The Current Market Survey's low response rate of 13.0% was not regarded as sufficient data to analyze this particular segment.

Means and Mode Response Analysis of Survey Instruments

Appendix A illustrates the percentage results of the aggregated responses to all applicable questions on the survey instruments. Question 1 asked respondents to identify the nature of the party traveling to Orleans County. The means response to question 1 was 1.981 with a standard deviation of 1.156. Further analysis indicates that out of those responding, 48.6% indicated that the party was a group of friends, while 36.8% indicated they traveled to Orleans County with immediate family.

Question 2 of the survey asked respondents to indicate the number of persons in the party traveling in Orleans County. The mean response was 5.483 with a standard deviation of 7.916 indicating a large variability in the responses from 0 to 99. Nearly thirty-three percent (32.7) of the respondents indicated they traveled in a party of four persons, 18.7% indicated traveling in a party of two, 14% indicated

traveling in a party of three, 10.1% indicated traveling in a party of five, while 5.8% of the respondents indicated they traveled in a party of six.

Question 3 of the survey asked respondents to identify their place of residence by city, state or province and postal zip code. The alphabetical coding of this question and the SPSSx computer program does not allow for the computation of the mean and standard deviation. The mode responses are illustrated in Figures 4.01, 4.02, and 4.03, based on postal zip codes. Nearly forty-three percent (42.2) of all respondents indicate residing in Pennsylvania, 21.8% reside in New York, 15.4% reside in Ohio, 3.9 reside in Massachusetts, and 2.1% reside in the State of New Jersey. The results suggests that Orleans County predominantly attracts visitors from immediate adjacent states as well as from other counties within New York State.

Question 4 of the survey asked respondents to identify their marital status. The means response was 4.360 with a standard deviation of 1.377. Over eighty percent (80.4) of the respondents indicated they are married while 11.3% are single.

FIGURE 4.01

Map of Pennsylvania Identifying Respondent's Residential Postal Zip Code

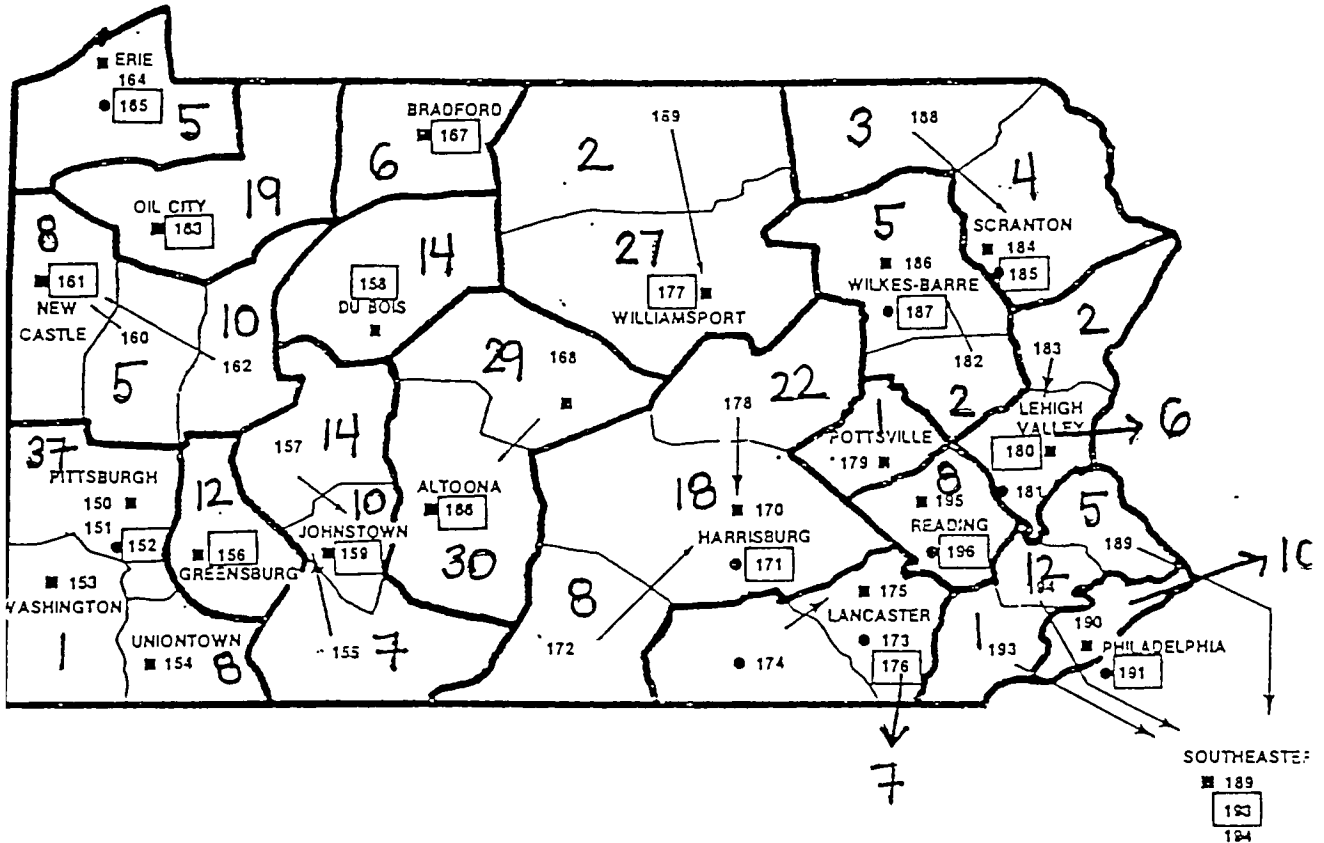


FIGURE 4.02

Map of New York Identifying Respondent's Residential Postal Zip Code

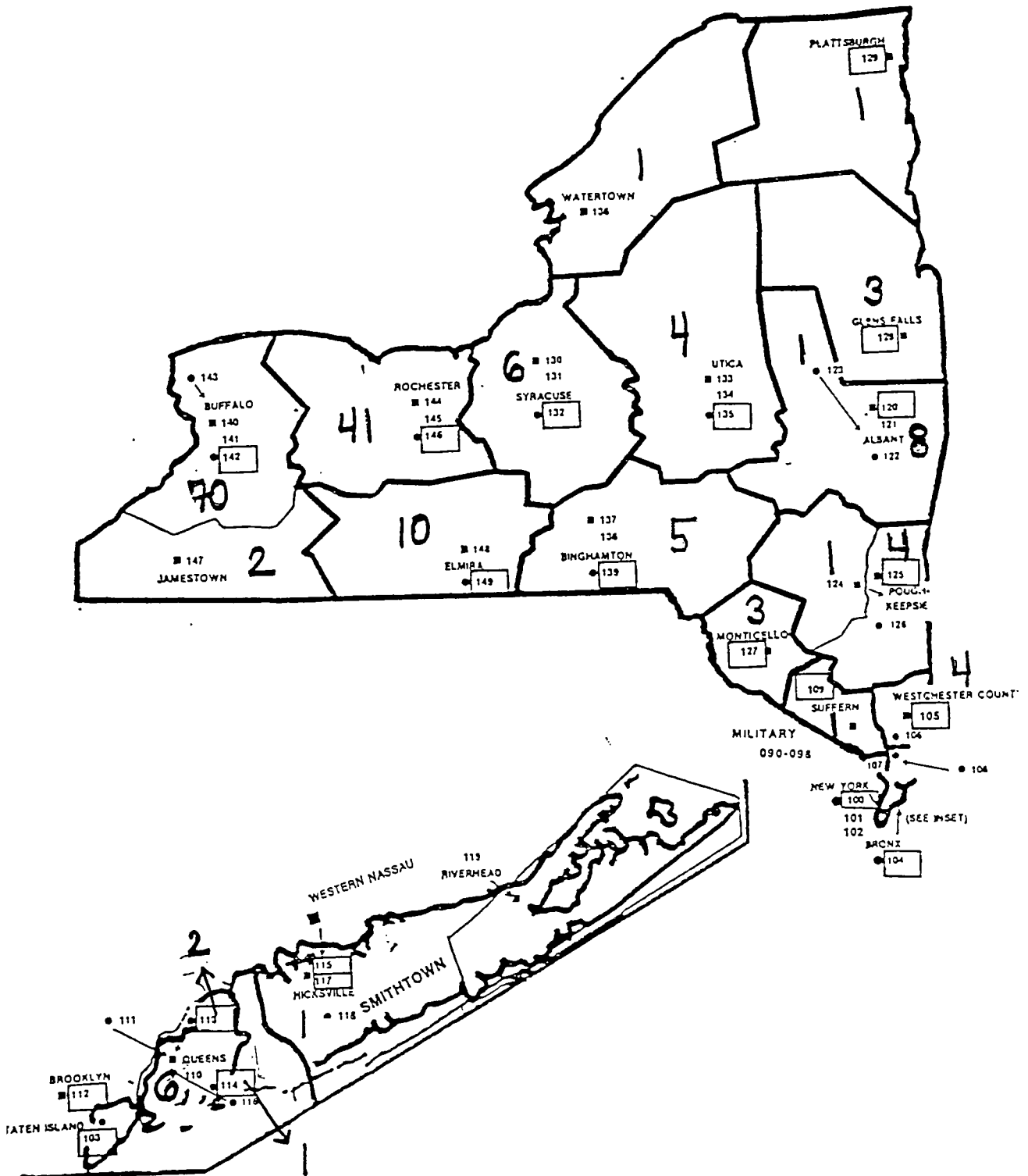
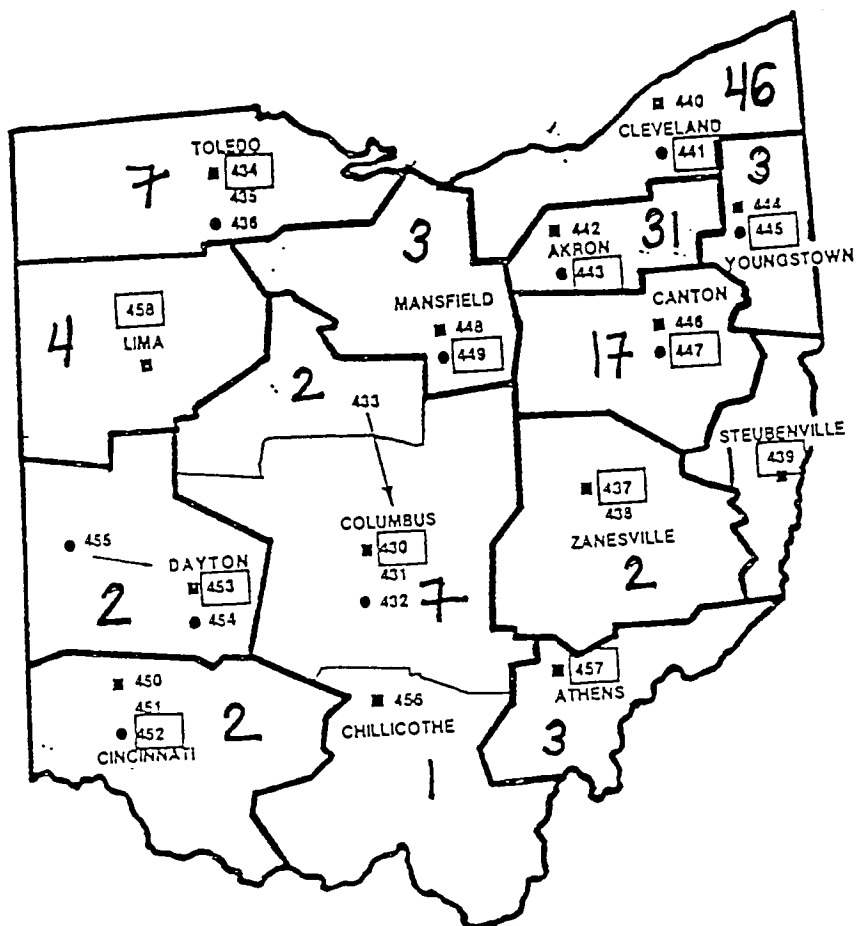


FIGURE 4.03

Map of Ohio Identifying Respondent's Residential Postal Zip Code



Question 5 of the survey asked respondents to indicate how many offspring they have. The mean response was 2.130 with a standard deviation of 1.814. Nearly thirty-percent (29.7) indicated having two children, 22.9% have none, 17.5% have three, 12.3 have one child, while 8.9% have four children.

Question 6 of the survey asked respondents to identify their occupation. The means response was 7.305 with a standard deviation of 5.203. Nearly twenty percent (19.7) of the respondents indicated they are retired, 16.6% indicated they are professionals, 11.9% indicated they are managers, while 9.8% identified themselves as being self-employed. Further analysis suggested the need to define the parameters of the occupation selections. One respondent commented "I am a manager, yet I consider myself a professional."

Question 7 of the survey asked respondents to establish their purpose of stay in Orleans County. The mean response was 1.490 with a standard deviation of 1.184. Nearly eighty-four percent (83.7) of all respondents indicated traveling to Orleans County for a vacation while 7.1% indicated traveling to the County for a specific event.

Question 8 of the survey asked respondents to indicate their intended length of stay in Orleans County. The mean response was 3.052 with a standard deviation of 1.274. Over thirty-six percent (36.9) of the respondents indicated staying in

Orleans County from one to three days, 31.8% staying three to five days, 11.6% staying five to seven days, 11.1 staying less than one week, while 8.2 indicated staying in the County for more than one week. Further analysis indicates the potential for duplicate responses due to the "overlap" in the selection increments (i.e. 1 to 3 days, 3 to 5 days, 5 to 7 days).

Question 9 of the survey asked respondents to distinguish Orleans County as their primary destination or a stopover enroute to another destination. Eighty-seven percent of the respondents identified Orleans County as their primary destination. The results suggest that Orleans County does in fact possess certain desirable amenities to motivate tourists to travel to a rural setting as a principal vacation destination. The remaining 13.0% indicated stopping in Orleans County enroute to other destinations, such as Niagara Falls and Toronto, Canada, and Rochester, New York.

Question 10 of the survey asked respondents to identify the type of accommodations utilized in the County. The mean response was 2.436 with a standard deviation of 1.375. Nearly thirty-nine percent (38.7) of the respondents selected one of the County's campground facilities for their lodging accommodations, 30.3% preferred to stay in a hotel or motel, 14.5% chose to stay in one of the many bed and breakfast establishments, 10.3% indicated they were not staying overnight

in Orleans County, while 3.5% of the respondents indicated they stayed staying family or friends .

Question 11 of the survey asked respondents to identify the means of transportation utilized to reach Orleans County. Respondents were asked to choose as many of the selections that apply. Over ninety-five percent (95.2) of the respondents arrived in Orleans County by personal vehicle, 3.0% arrived by bus or motorcoach, 1.6% arrived by rental vehicle, .6% arrived by airplane, and .1% arrived by train. The results are in accordance with the fact that the majority of respondents reside in New York and the adjacent states, which are all within reasonable driving distance to Orleans County.

Question 12 of the survey asks respondents to establish what sources were utilized in receiving information on Orleans County. Respondents were asked to choose as many of the selections that apply. Nearly forty-nine percent (48.5) of the respondents receive information on the County from family and friends, 25.1% received information from mailed requests, 20.3% received information from a magazine or brochure, 16.3% received information specifically from The Orleans County Travel Guide, 12.5% indicated not using any source for information on the County, 9.8% received information specifically from The Niagara Region Travel Guide, 9.5% received information from an information booth, 4.9% and 1.8% used

the services of an automobile club or a travel agent respectively, to receive information on Orleans County.

Question 13 of the survey asks respondents to identify what attractions they are aware of in Orleans County. Nearly eighty percent (79.3) are aware of the fishing activities, 48.3% are aware of the boating activities, 43.3% are aware of the camping facilities, 32.7% are aware of the Erie-Canal, 31.9% are aware of the Seaway Trail, 21.7% are aware of the scenic waterways and byways in the County, 17.1% are aware of the Apple Grove Inn located in Medina, New York, 16.0% are aware of the Canal Packet Boat Tour on the Erie Canal, 14.3% are aware of the hunting activities, 14.2% are aware of the wildlife refuges and trail located throughout the County, 14.0% are aware of the Historic Village Inn Restaurant, 11.1% are aware of the Cobblestone Museums, 10.7% are aware of the various historic locations in the County, 8.3% are aware of the numerous County festivals, 5.2% are aware of the Historic Court House Square, while 2.6% of the respondents identified being aware of "other" attractions in the County.

Question 14 of the survey asked respondents to identify which of the attractions located in Orleans County did they participate in or visit. Seventy-three percent of the respondents participated in the fishing activities, 37.8% participated in the boating activities, 32.4% utilized the camping facilities, 19.5% visited the Seaway Trail, 15.0% visited the Erie-Barge Canal, 13.9% visited the scenic waterways

and byways, 11.9% visited the Apple Grove Inn, 7.2% participated in the Canal Packet Boat Tour, 7.2% visited the wildlife refuges and trails, 6.3% visited other historic locations in the County, 5.2% visited the Cobblestone Museum, 4.5% visited the County festivals, 3.2% visited the Historic Court House Square, 2.0% participated in or visited "other" attractions, and 1.2% of the respondents participated in hunting activities while staying in Orleans County.

Question 15 of the survey asked respondents to identify their annual household income. The mean response was 3.560 with a standard deviation of 1.972. Over twenty-one percent (21.1) of the respondents indicated an annual household income of \$20,000 - \$30,000, 19.6% indicated an annual household income of \$30,001 - \$40,000, 17.3% indicated an annual household income of \$40,001 - \$50,000, 14.1% indicated an annual household income under \$20,000, 11.9% indicated an annual household income of \$50,001 - \$60,000, 7.0% indicated an annual household income over \$80,000, 5.9% indicated an annual household income of \$60,001 - \$70,000, and 3.2% of the respondents indicated an annual household income of \$70,001 - \$80,000.

Question 16 of the survey asked respondents to calculate their expense for accommodations per party, per day in Orleans County. The mean response was 2.789 with a standard deviation of 1.536. Nearly twenty-nine percent (28.4) of the respondent expended \$16 - \$30 per party, per day 22.5% expended less than \$15, 20.2% expended \$31 - \$45, 14.7% expended \$46 - \$60, 8.2% expended more than

\$75, 5.2% expended \$61 - \$75, while .9% of the respondents indicated that the accommodation expense was included in the price of the tour.

Question 17 of the survey asked respondents to calculate their expense for food/meals per person, per day in Orleans County. The mean response was 3.715 with a standard deviation of 1.488. Over twenty-four percent (24.3) of the respondents expended \$16 - \$20 per person, per day on food and meals, 20.3% expended \$11 - \$15, 16.9% expended \$6 - \$10, 15.9% expended \$21 - \$25, 15.5% expended more than \$25, 7.1% expended less than \$5 per person, per day on food/meals in Orleans County.

Question 18 of the survey asked respondents to calculate their expense for transportation (including tolls, gas, etc.) per party, per day in Orleans County. The mean response was 2.467 with a standard deviation of 1.483. Over thirty-five percent (35.6) of the respondents expended \$6 - \$10 per party, per day on transportation, 29.0% expended less than \$5, 14.4% expended \$11 - \$15, 9.5% expended \$16 - \$20, 6.1% expended more than \$25, 4.5% expended \$21 - \$25, while .8% of the respondents indicated that the cost of transportation was included in the price of their tour.

Question 19 of the survey asked respondents to calculate their expense for attractions and events (including entrance fees, charter fees, licensing fees, etc.) per

person, per day in Orleans County. The mean response was 3.533 with a standard deviation of 2.012. Nearly thirty percent (29.1) of the respondents expended more than \$25 per person, per day on attractions and events, 23.3% expended less than \$5, 17.4% expended \$6 - \$10, 11.6% expended \$16 - \$20, 10.9% expended \$11 - \$15, 6.2% expended \$21 - \$25, while 1.5% of the respondents indicated that the cost of attractions and events was included in the price of their tour. The results suggest a high percentage of visitors allocate more than \$25 per person, per day to compensate for the costs associated with fishing activities in the County, such as chartering a boat, fuel, and licensing fees. This analysis corresponds with the results of Question 14 which indicated that 73.0% of the respondents participate in such an activity while staying in the County.

Question 20 of the survey asked respondents to calculate their expense for personal items (including souvenirs, sundries, recreation equipment, etc.) per person, per day in Orleans County. The mean response was 2.599 with a standard deviation of 1.677. Thirty-five percent of the respondents expended less than \$5 per person, per day on personal items, 24.7% expended \$6 - \$10, 12.9% expended \$11 - \$15, 11.5% expended \$16 - \$20, 9.9% expended more than \$25, 5.4% expended \$21 - \$25, while .6% of the respondents indicated the cost of personal items were included in the price of their tour.

Question 21 of the survey asked respondents to rate their overall satisfaction with Orleans County on a scale of one to ten. The mean response was 8.108 with a standard deviation of 1.636. Over thirty-three percent (33.7) of the respondents rated their stay an 8, 24.4% rate their stay a 10, 14.9% rated their stay a 7, 14.2% rated their stay a 9, while 5.8% of the respondents rated their stay in Orleans County a 6.

The final question on the survey (Question 22) asked respondents how many times they have visited Orleans County. The mean response was 11.764 with a standard deviation of 22.021 indicating a large variability in the responses from 0 to 99. Nearly twenty percent (19.6) of the respondents indicated visiting Orleans County at least once, 12.9% indicated visiting the County twice, 11.9% indicated visiting the County three times, 10.1% indicated visiting the County four times, while 7.7% indicated visiting Orleans County five times.

Results in Crosstabs Analysis

To ascertain the relationship between several of the variable pairs in this study, a crosstab analysis was performed. The results of the crosstabulations were divided into two categories: (1) Market Demographic Characteristics, and (2) Market Spending Characteristics. A third category was included to illustrate the estimated potential tax revenue generated from tourist spending characteristics defined by the crosstabs analysis.

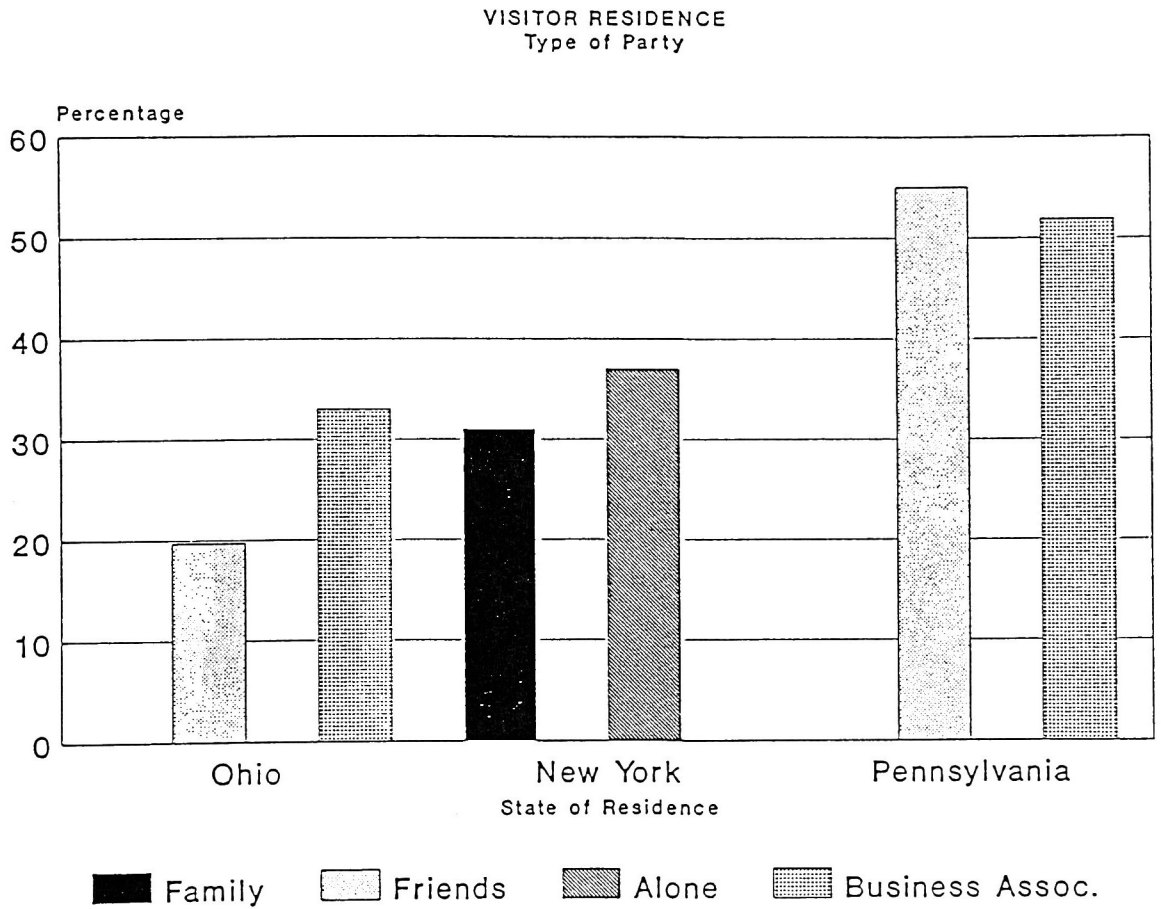
Market Demographic Characteristics

Figure 4.04 illustrates the results of the crosstabulation of Visitor Residence (Variable 05) and Type of Party (Variable 01). Thirty-three percent of the respondents from Ohio who visit Orleans County classify their party as business associates; 19.7% identify themselves as a group of friends. Thirty-seven percent of the respondents from New York indicate they travel alone to Orleans County; thirty-one percent classify their party as immediate family. Fifty-five percent of the respondents from Pennsylvania classify their visiting party as a group of friends; 51.9% identify their group as business associates.

Figures 4.05, 4.06, 4.07 reveal the important role of word-of-mouth advertising in marketing the tourism product. Figure 4.05 illustrates the results of the crosstabulation between the Source of Information (Variable 16) and the Length of Stay (Variable 10). The respondents overwhelmingly indicated that friends and family provide the most information to visitors with various lengths of stay in Orleans County. With the exception of those visitors staying less than one day, at least 48.8% of all other visitors staying at least one day, received information on the County from family and friends. Mailed requests and family/friends equally provided information to visitors staying less than one day at 28.8%.

FIGURE 4.04

Crosstabulation of Visitor Residence (Variable 05) by
Type of Party (Variable 01)



Based on Postal Zip Code

FIGURE 4.05

Crosstabulation of Source of Information (Variable 16) by
Length of Stay (Variable 10)

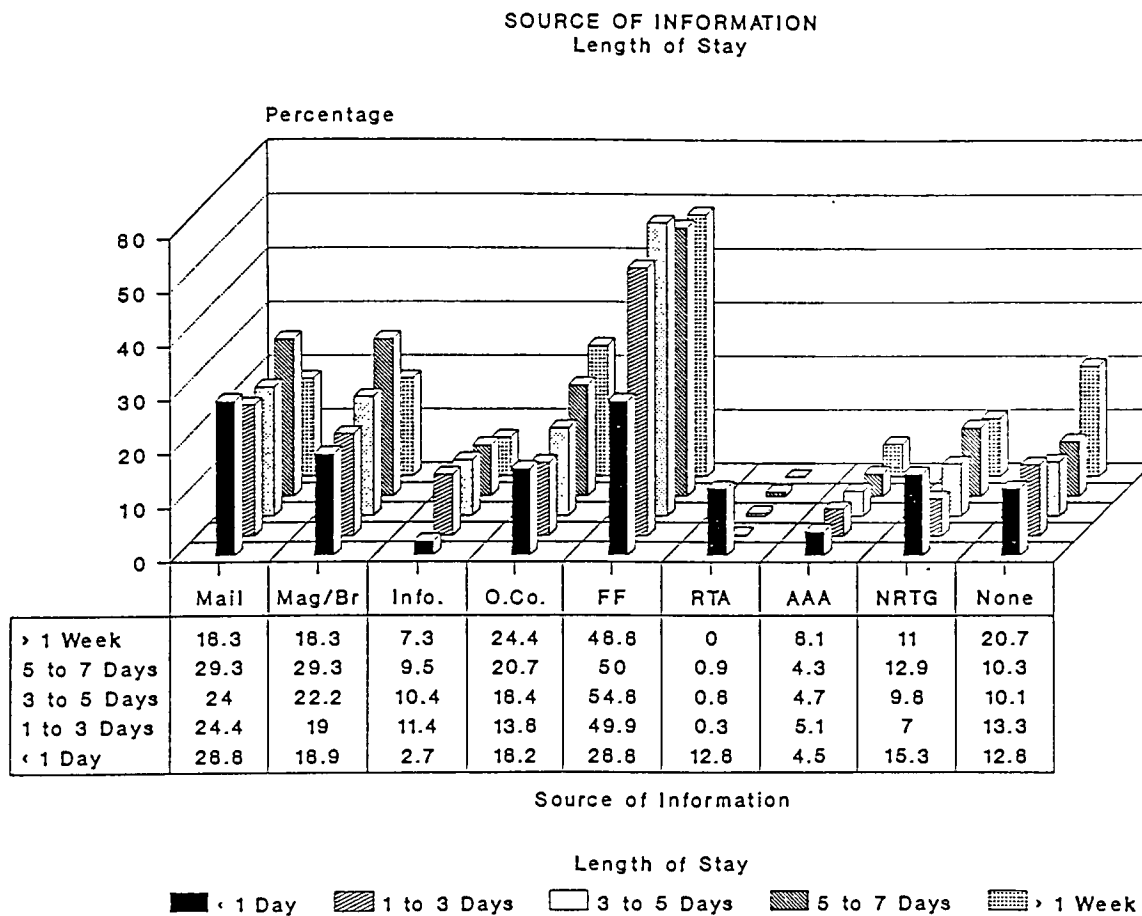


Figure 4.06 illustrates the results of the crosstabulation between the Source of Information (Variable 16) and the Type of Party (Variable 1) traveling to Orleans County. For those traveling alone, 40% received their information from a mailed request; 55.6% of business associates used family and friends for information, 22.1% of groups of relatives responded more to mailed requests, 42.9% of tour members used the services of retail travel agents, 58.1% of groups of friends received information from family and friends, and 37.1% of immediate families traveling to Orleans County used family and friends to obtain information.

Figure 4.07 illustrates the results of the crosstabulation of Source of Information (Variable 16) and Type of Accommodations (Variable 14) utilized by visitors. The respondents indicated that regardless of their accommodation preference, at least 42.7% received information on Orleans County from family and friends. Nearly thirty-three percent (32.7) of those not staying in Orleans County relied primarily on family and friends as well.

Figures 4.08-4.14 address the issue of what attractions visitors are aware of in Orleans County (Variable 17) and which attractions they actually participated in or visited (Variable 18), crosstabulated with the type of party (Variable 1). Figure 4.08 illustrates that 89.3% of groups of friends who responded are aware of the fishing activities in Orleans County, while 85.7% actually participated in fishing during their visit. This figure also indicates that 50% of groups of friends are aware of boating

FIGURE 4.06

Crosstabulation of Source of Income (Variable 16) by
Type of Party (Variable 01)

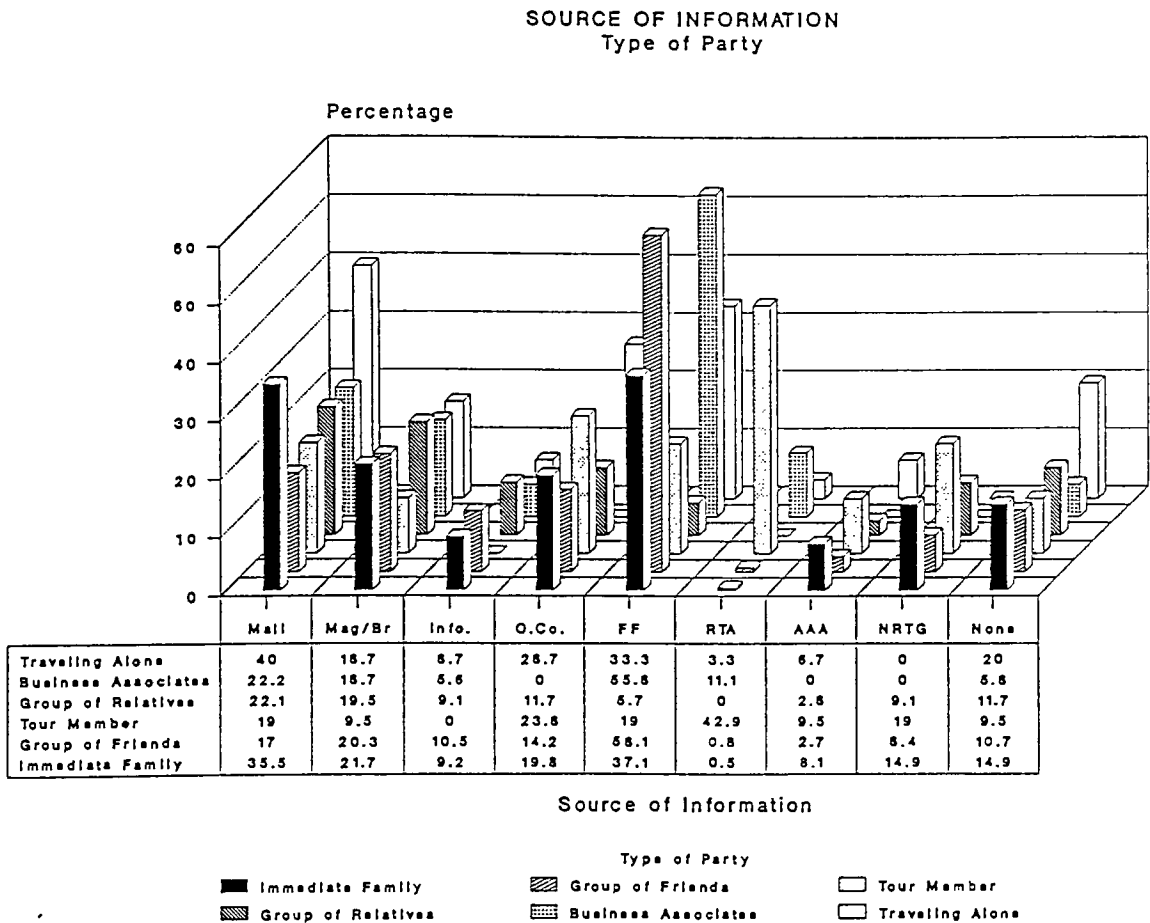


FIGURE 4.07

Crosstabulation of Source of Income (Variable 16) by
Type of Accommodations (Variable 14)

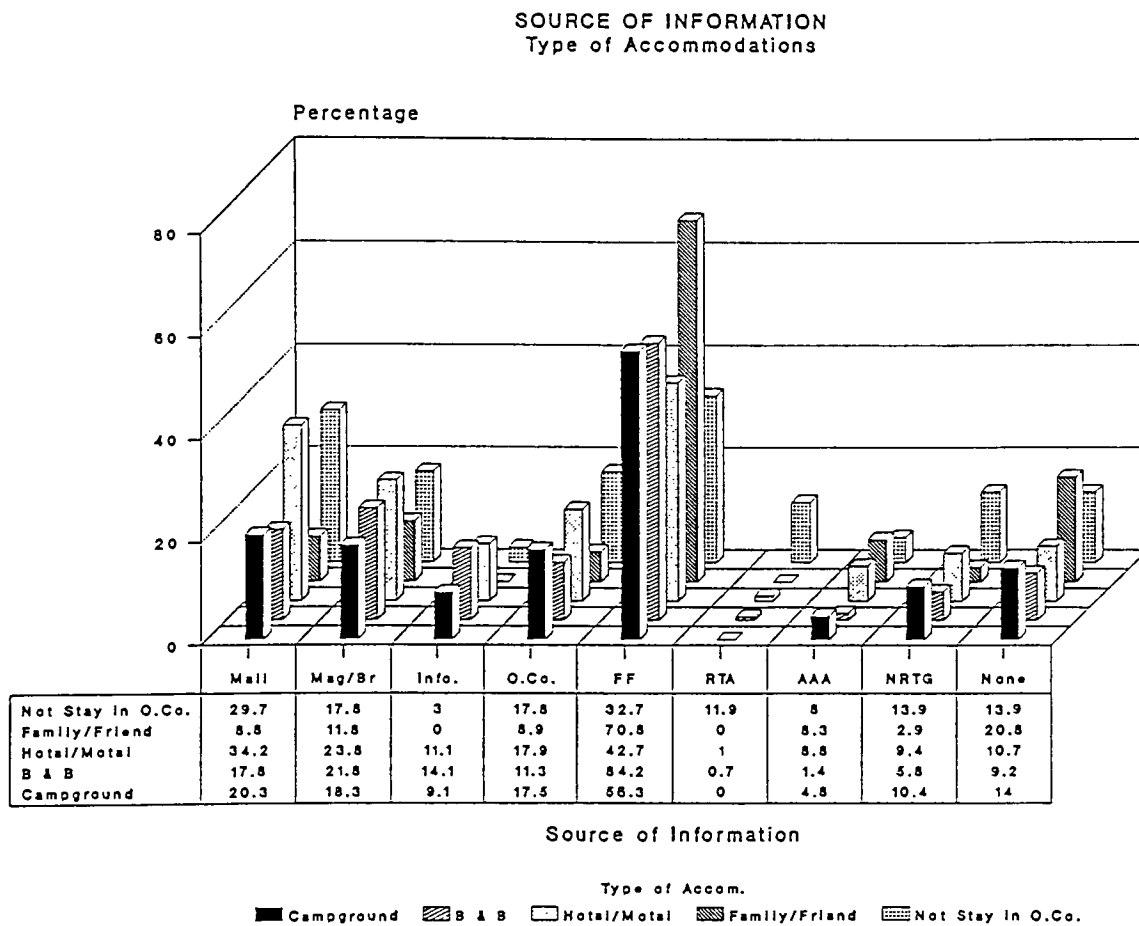
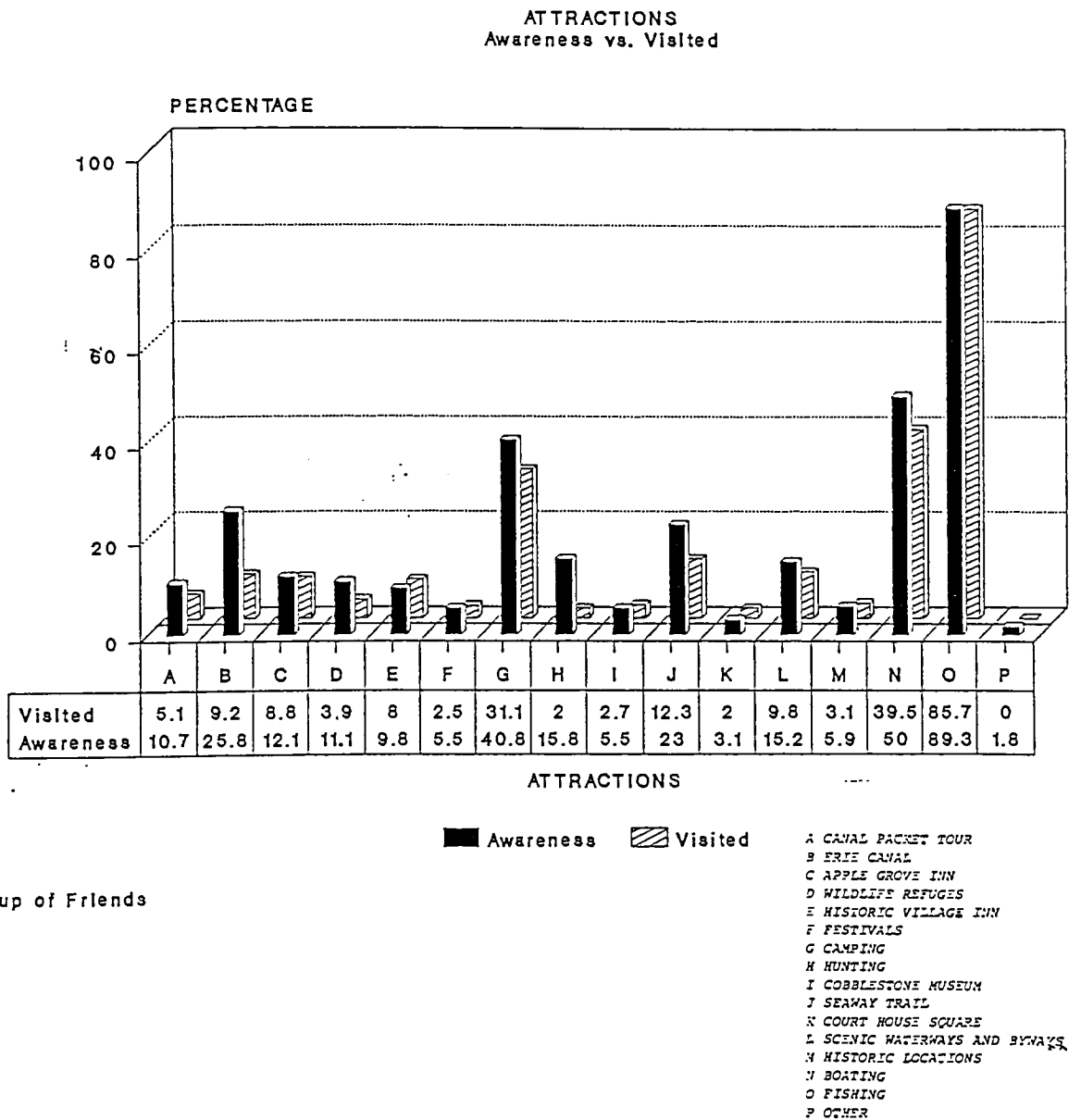


FIGURE 4.08

Crosstabulation of Type of Party-Group of Friends (Variable 01A) by
Attractions Aware Of (Variable 17) Versus
Attractions Participated In or Visited (Variable 18)



activities and 39.5% actually go boating while staying in Orleans County. Additionally, 40.8% of this same party are aware of the camping facilities in the County, while only 31.1% actually used those facilities.

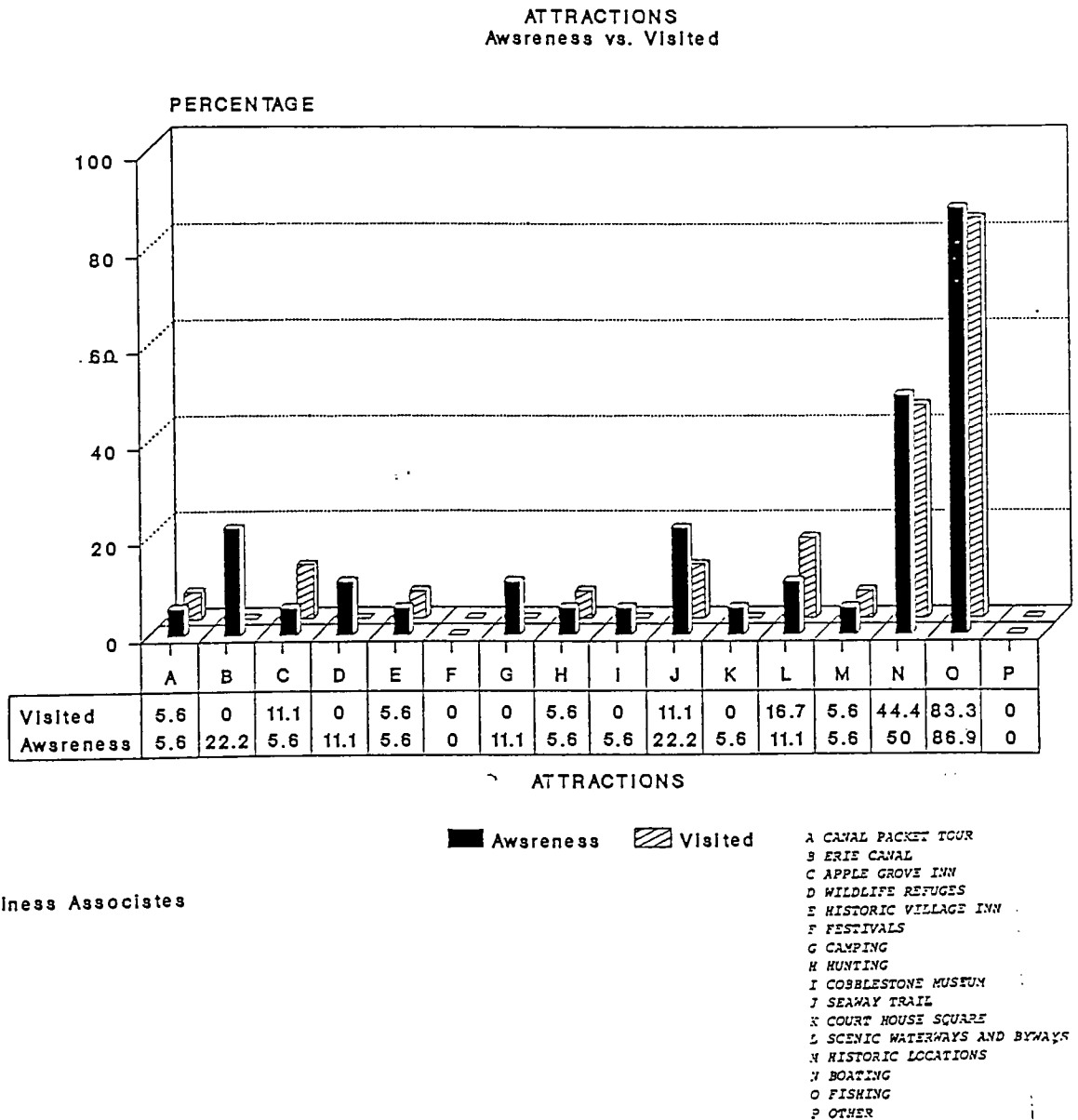
Figure 4.09 illustrates that 88.9% of business associates who responded are aware of the fishing activities in Orleans County with 83.3% actually participated in the sport during their visit. This table also indicates that 50% of business associates are aware of boating activities in the County while only 44.4% actually went boating.

Figure 4.10 illustrates that 83.1% of the group of relatives who responded are aware of the fishing activities in Orleans County, while 79.2% actually participated in the sport. This table also indicates that 46.8% of the groups of relatives are equally aware of the boating activities and camping facilities in the County, however, 39% participated in boating activities and only 33.8% used the camping facilities in Orleans County.

Figure 4.11 illustrates that 69.9% of immediate families who responded are aware of the fishing activities in Orleans County, while only 38.3% participated in the sport. This figure also indicates that 50% of immediate families are aware of the camping facilities, of which 38% used those services. Also, 49.9% of the same group are aware of the boating activities in the County, with only 11.4% who actually

FIGURE 4.09

Crosstabulation of Type of Party-Business Associates (Variable 01B) by
Attractions Aware of (Variable 17) Versus
Attractions Participated In or Visited (Variable 18)



Business Associates

FIGURE 4.10

Crosstabulation of Type of Party-Group of Relatives (Variable 01C) by
Attractions Aware of (Variable 17) Versus
Attractions Participated In or Visited (Variable 18)

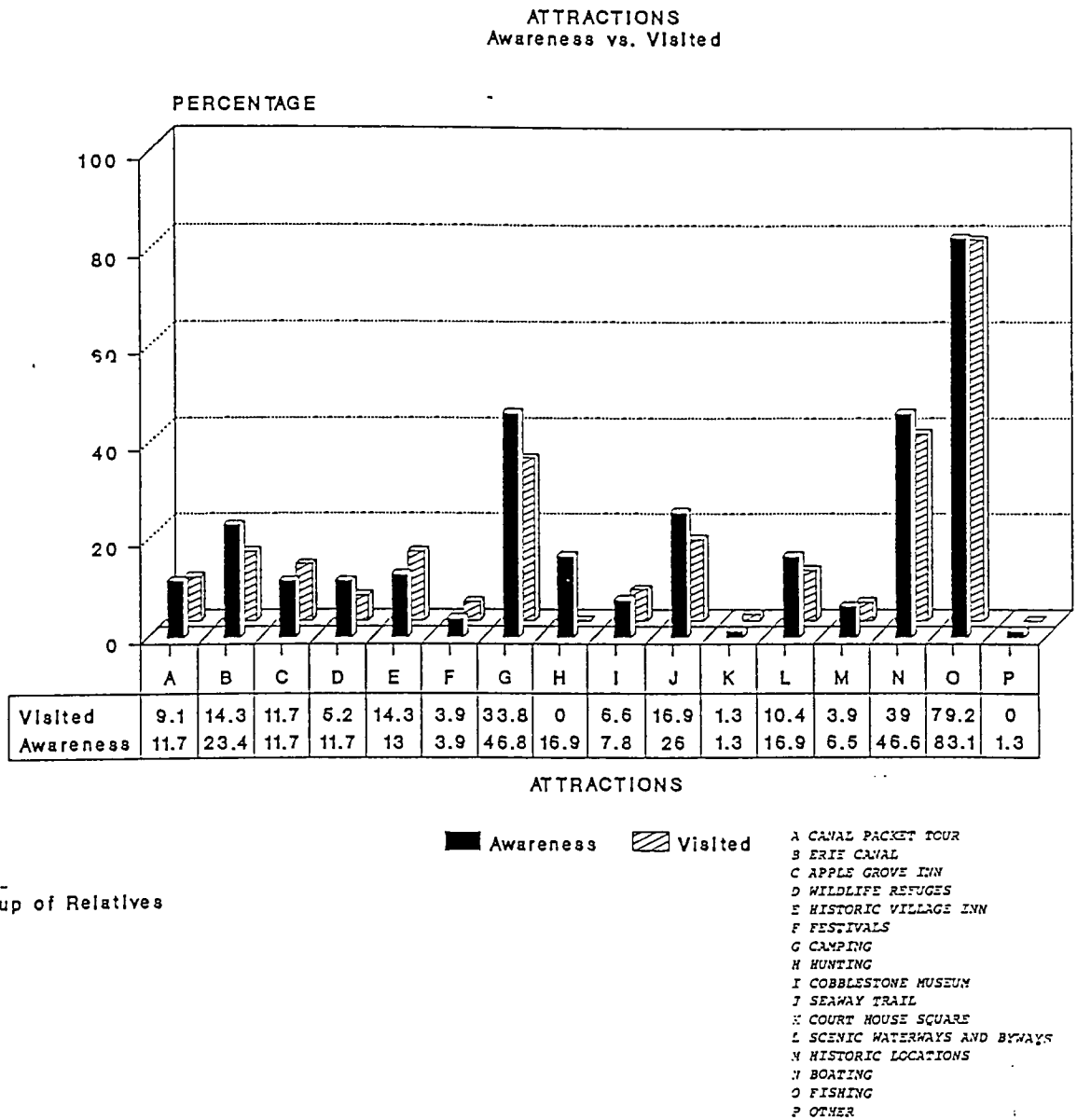
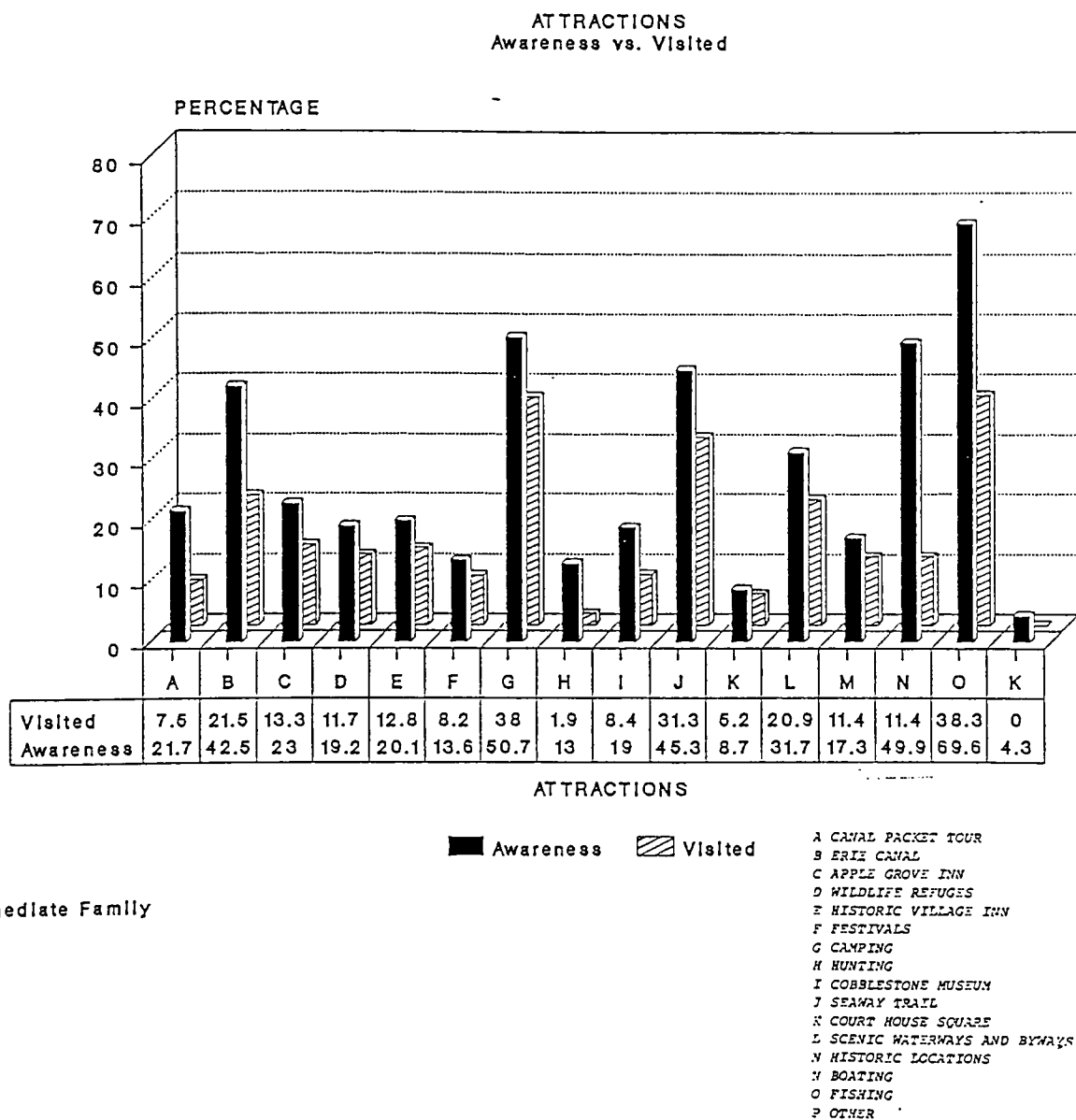


FIGURE 4.11

Crosstabulations of Type of Party-Immediate Family (Variable 01D) by
Attractions Aware of (Variable 17) Versus
Attractions Participated In or Visited (Variable 18)



Immediate Family

go boating. Forty-five percent of immediate families visiting the area are aware of the Seaway Trail in Orleans County, of which 31.3% had actually visited it.

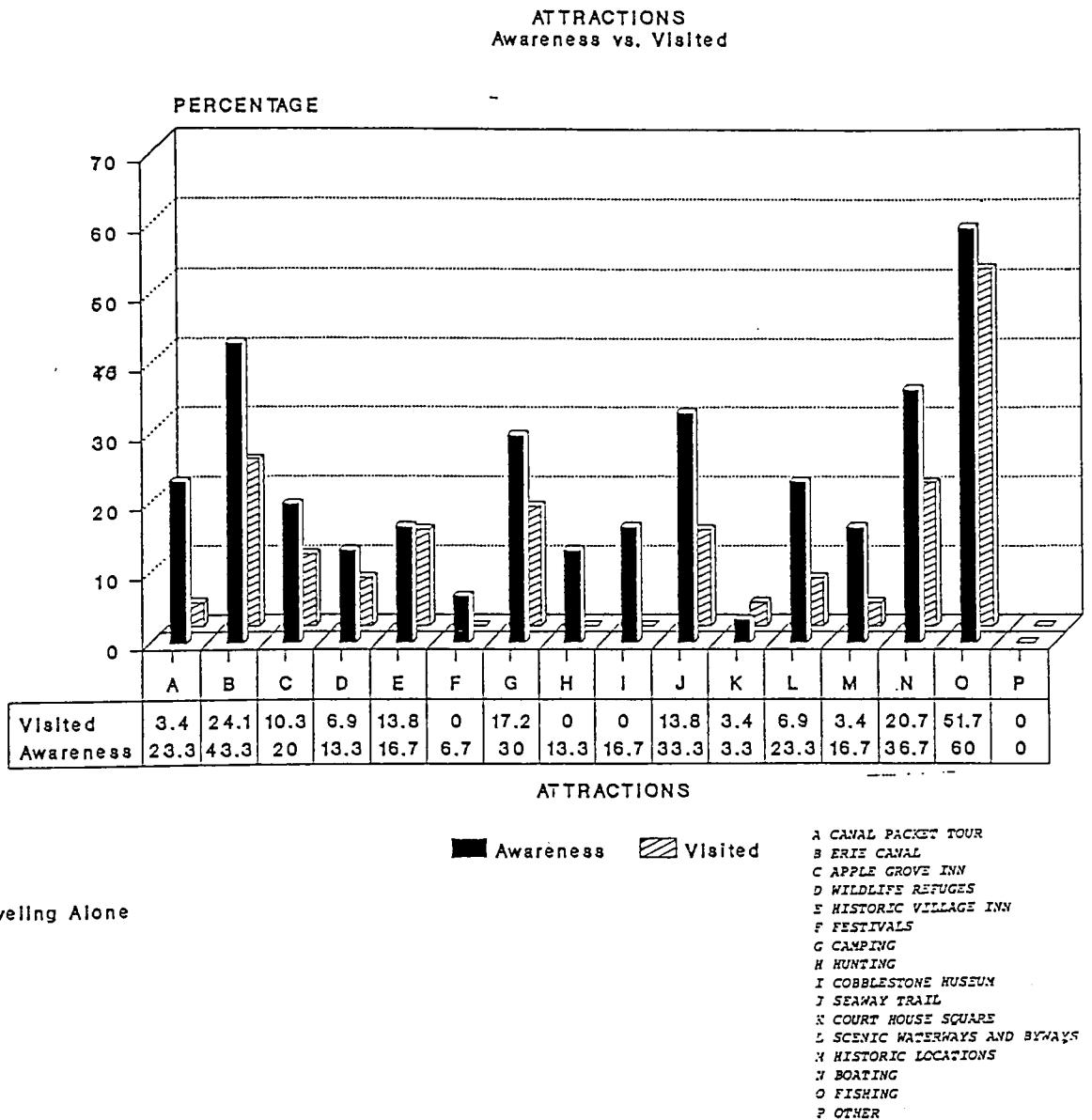
Figure 4.12 illustrates that 60% of those visitors traveling alone to Orleans County are aware of the fishing activities in the area while 51.7% actually participated in the sport. In addition, 43.3% of the respondents traveling alone in Orleans County are aware of the Erie Canal although only 24.1% visited the Canal.

Figure 4.13 illustrates that 57.1% of tour members are equally aware of the Canal Packet Boat Tour and the Apple Grove Inn, of which they visited 47.6% and 66.7% respectively. Also, 52.4% of the tour members responding to the survey are aware of the Erie Canal while 38.1% actually visited the Canal.

Figure 4.14 illustrates the results of the crosstabulation of Attractions Aware Of (Variable 17) with Attractions Visited (Variable 18). This figure outlines what percentage of total respondents actually participated in or visited the attractions that they indicated they are aware of in Orleans County. Forty-one percent of the respondents are aware of the Erie-Barge Canal actually visited the Canal. Sixty-nine percent of the respondents aware of the camping facilities in the County actually utilized such services. Fifty-five percent of the respondents aware of the Seaway Trail actually visited the Trail. Seventy-two percent of the respondents aware of the County's boating activities indicated they participated in boating. Ninety-one percent

FIGURE 4.12

Crosstabulation of Type of Party-Traveling Alone (Variable 01E) by
Attractions Aware Of (Variable 17) Versus
Attractions Participated In or Visited (Variable 18)



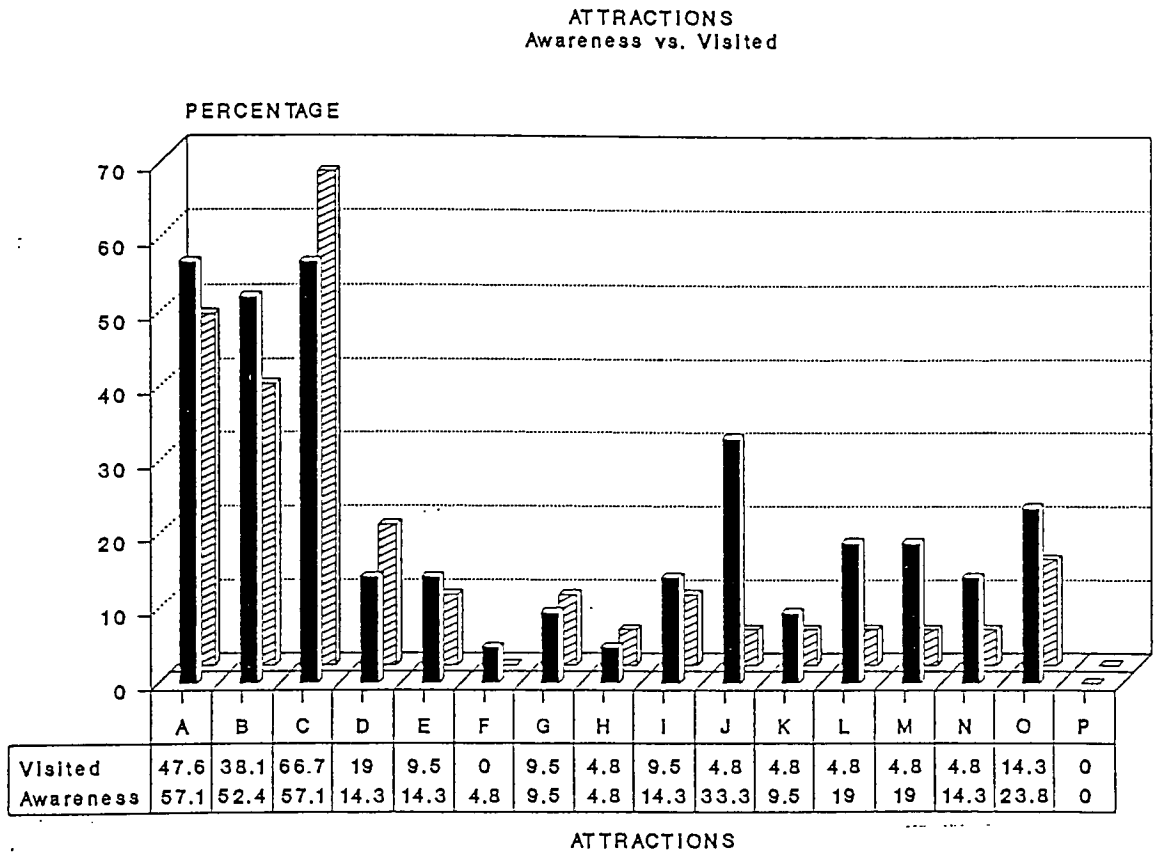
Travelling Alone

FIGURE 4.13

Crosstabulation of Type of Party-Tour Member (Variable 01F) by

Attractions Aware Of (Variable 17) Versus

Attractions Participated In or Visited (Variable 18)



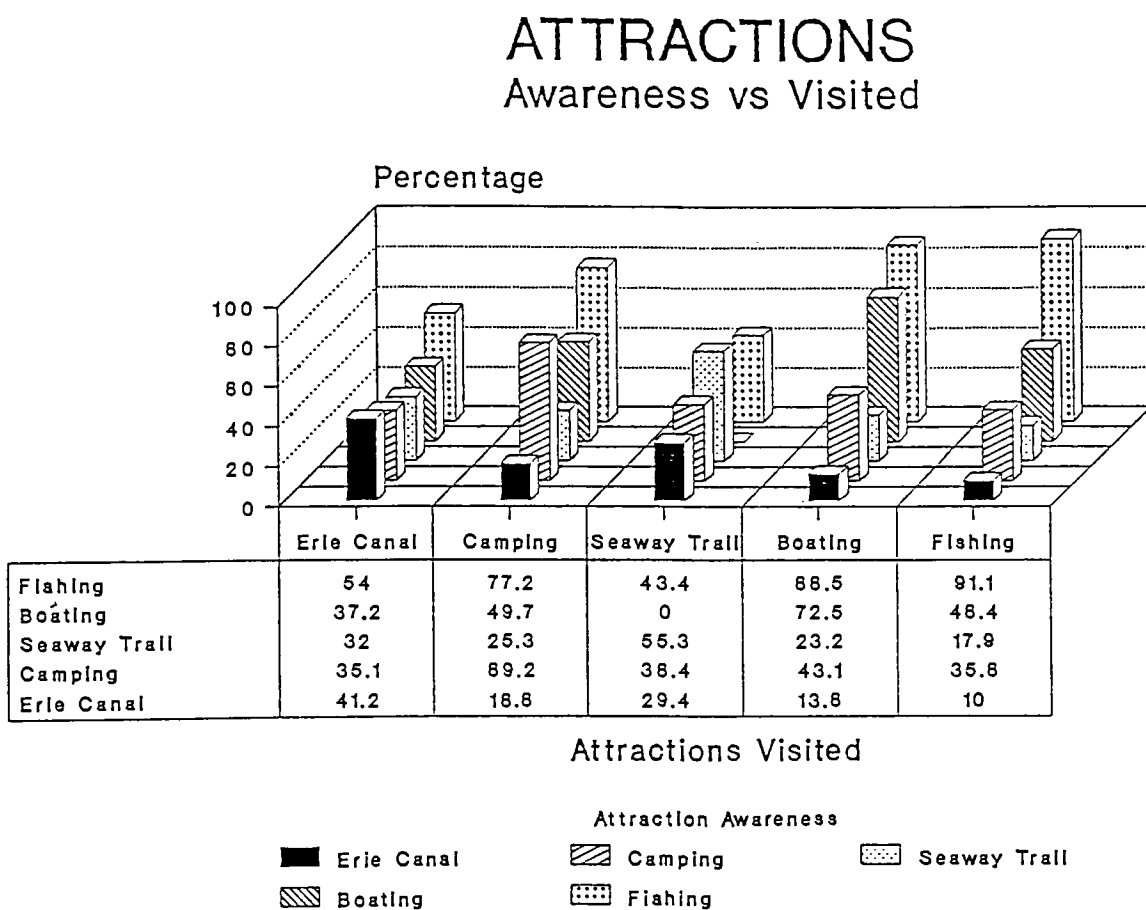
■ Awareness ▨ Visited

A CANAL PACKET TOUR
B ERIE CANAL
C APPLE GROVE INN
D WILDLIFE REFUGES
E HISTORIC VILLAGE INN
F FESTIVALS
G CAMPING
H HUNTING
I COBBLESTONE MUSEUM
J SEAWAY TRAIL
K COURT HOUSE SQUARE
L SCENIC WATERWAYS AND BYWAYS
M HISTORIC LOCATIONS
N BOATING
O FISHING
P OTHER

Tour Member

FIGURE 4.14

Crosstabulation of Top Five Attractions Respondents Are Aware Of (Variable 17) by
Top Five Attractions Respondents Participate In or Visit (Variable 18)



Among Top Five Attractions

of the respondents who indicated they were aware of the fishing activities in Orleans County actually participated in the sport.

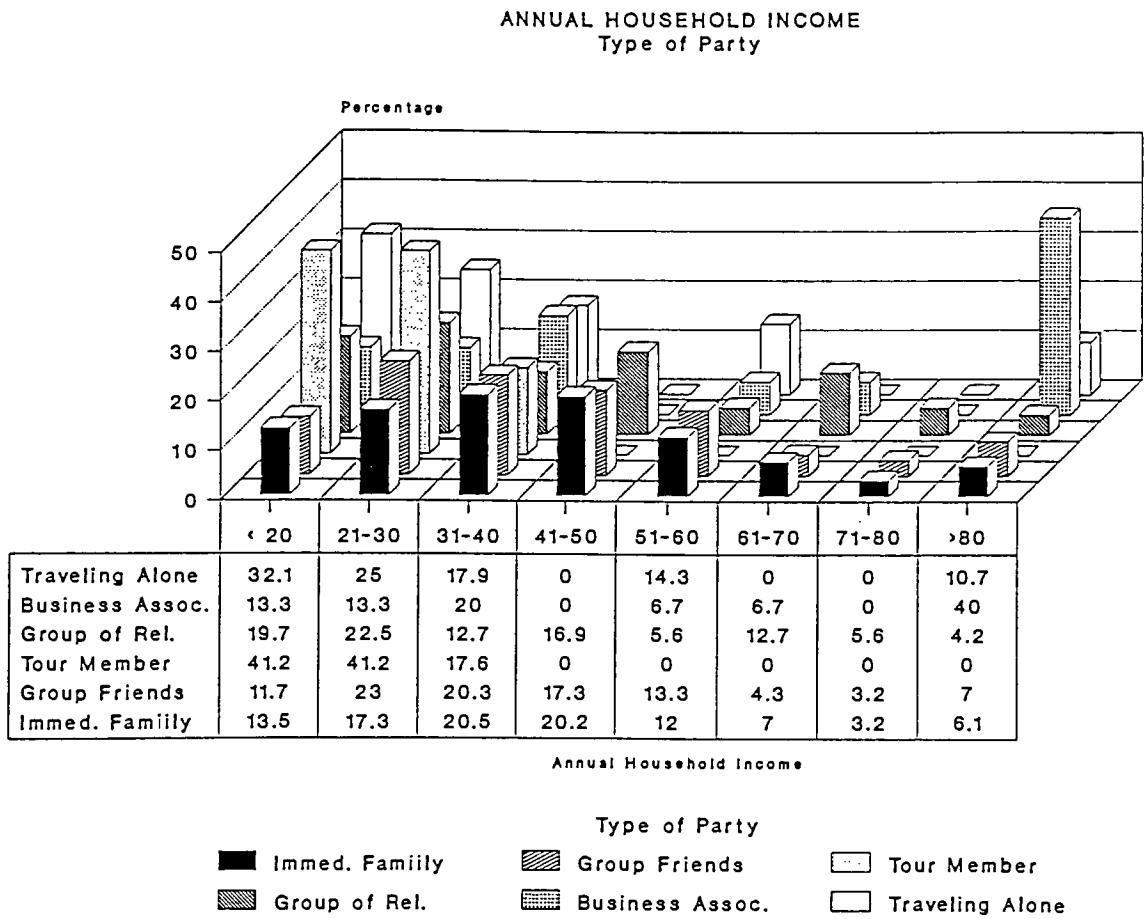
Figure 4.15 illustrates the results of the crosstabulation of Type of Party (Variable 1) and Annual Household Income (Variable 19). Of those individuals traveling alone to Orleans County, 32.1% earn less than \$20,000 annually. Forty-percent of business associates responding to the survey indicated annual earnings greater than \$80,000. Twenty-two percent (22.5) of groups of relatives responding to the survey indicate annual earnings between \$20,000 and \$30,000. Forty-one percent (41.2) of tour members responding to the survey equally earn under \$20,000 and between \$20,000 and \$30,000 annually. Twenty-three percent of groups of friends responding to the survey indicated earning between \$20,000 and \$30,000 annually. Twenty-percent (20.2) of immediate families responding to the survey indicated annual earnings between \$30,000 and \$40,000.

Market Spending Characteristics

The spending patterns for accommodations by responding visitors to Orleans County were individually crosstabulated with each type of visiting party, purpose of stay, and length of stay, resulting in Figures 4.16, 4.17, and 4.18.

FIGURE 4.15

Crosstabulation of Type of Party (Variable 01) by
Annual Household Income (Variable 19)



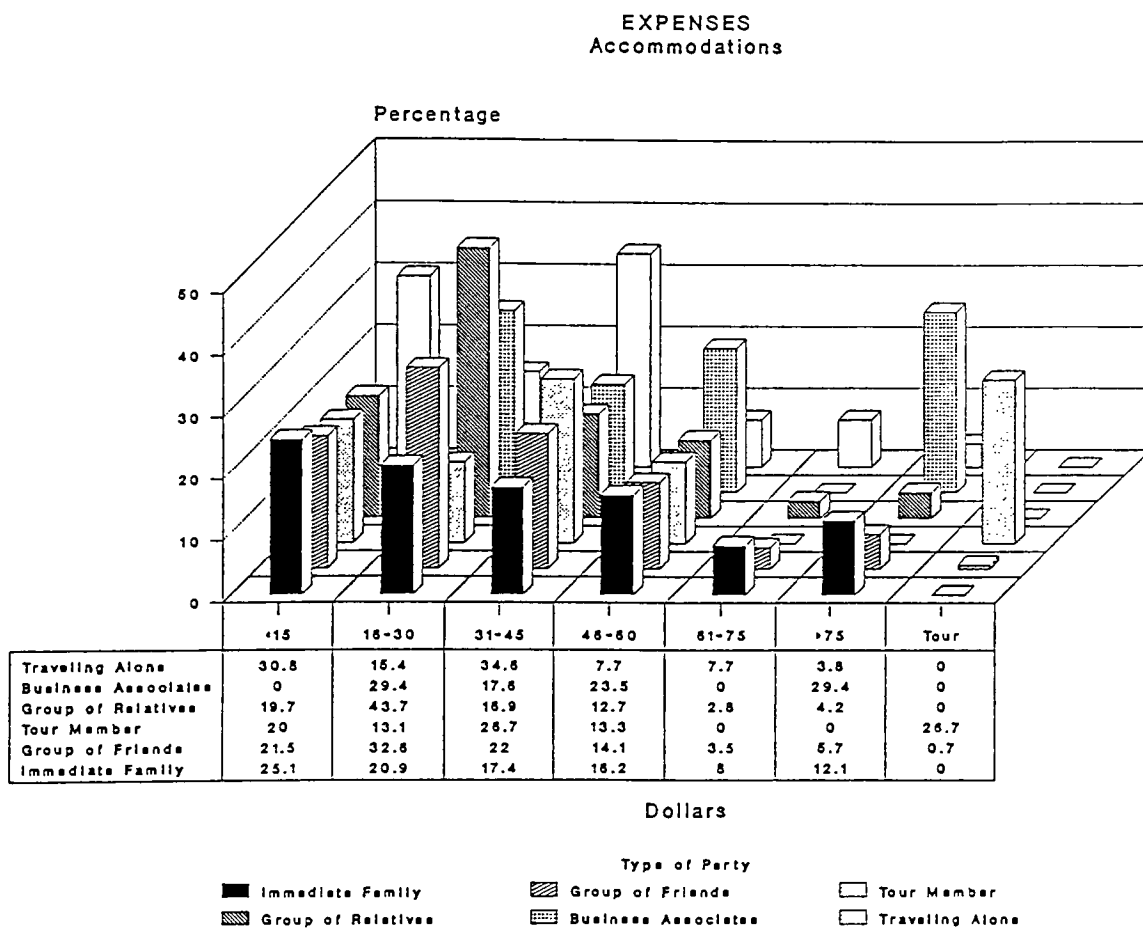
Figures in Thousands of Dollars

Figure 4.16 illustrates the results of the crosstabulation of Expense for Accommodations (Variable 20) and Type of Party (Variable 1). Nearly thirty-five percent (34.6) of respondents traveling alone to Orleans County expend between \$31-\$45 per day, per party on accommodations. Over twenty-nine percent (29.4) of business associates responding expend between \$16 - \$30 per day, per party; 43.7% of responding groups of relatives expend between \$16 - \$30; 26.7% of tour members equally stated expending between \$31 - \$45 on accommodations or those costs are included in the tour price. Over thirty-two percent (32.6) of groups of friends responded they expend between \$16 - \$30; and, 25.1% of immediate families responding to the survey expend less than \$15.

Figure 4.17 illustrates the results of the crosstabulation of Expense of Accommodations (Variable 20) and Purpose of Stay (Variable 09). Nearly thirty percent (29.5) of respondents traveling to Orleans County on vacation expend between \$16 - \$30 per day, per party on accommodations; 42.9% of the respondents traveling on business expend between \$46 - \$60; 38.7% of the respondents visiting family and friends expend less than \$15; 24.1% of the respondents visiting Orleans

FIGURE 4.16

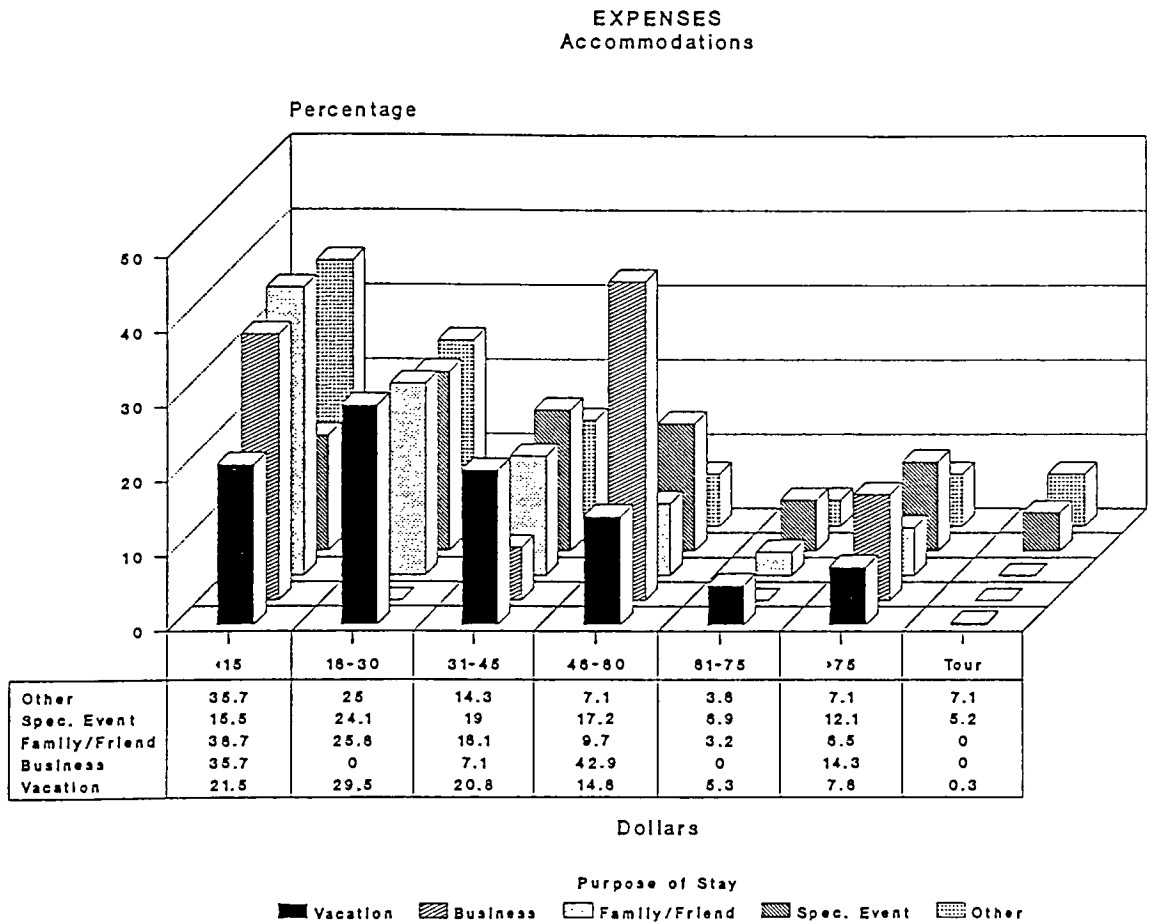
Crosstabulation of Expense for Accommodations (Variable 20) by
Type of Party (Variable 01)



Per party per day

FIGURE 4.17

Crosstabulation of Expense for Accommodations (Variable 20) by
Purpose of Stay (Variable 09)



Per party per day

County for a specific event expend between \$16 - \$30; and, 35.7% of the respondents traveling to Orleans County for an "other" purpose expend less than \$15.

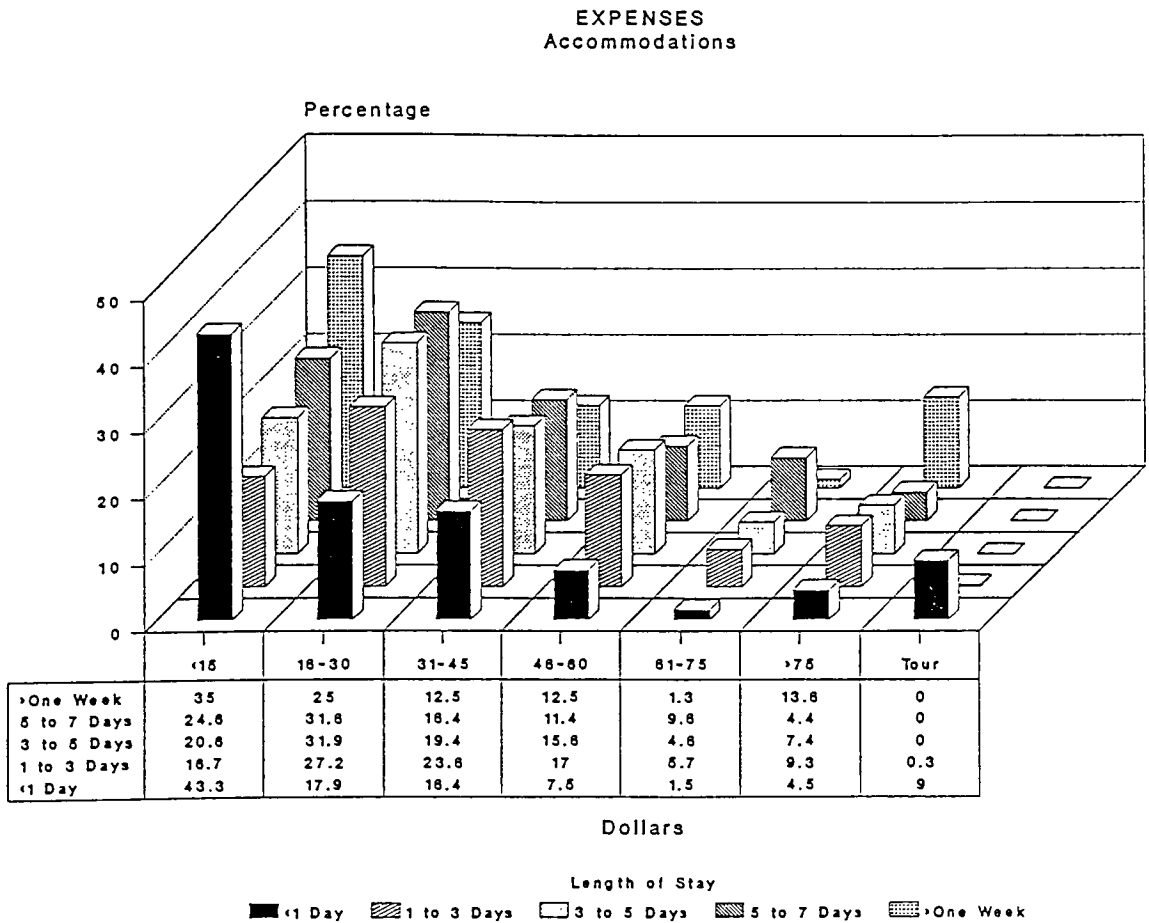
Figure 4.18 illustrates the results of the crosstabulation of Expense for Accommodations (Variable 20) and Length of Stay (Variable 10). Thirty-five percent of those respondents staying longer than one week in Orleans County expend less than \$15 per day, per party on accommodations; 31.6% of the respondents staying five to seven days expend between \$16 - \$30; 31.9% of the respondents staying three to five days expend between \$16 - \$30; 27.2% of the respondents staying from one to three days expend \$16 - \$30; and 43.3% of the respondents staying less than one day in Orleans County spend less than \$15.

The spending patterns for food purchases by responding visitors to Orleans County were individually crosstabulated with each type of visiting party, purpose of stay, and length of stay, resulting in Figures 4.19, 4.20, and 4.21.

Figure 4.19 illustrates the results of the crosstabulation of Expense for Food and Meals (Variable 21) and Type of Party (Variable 01). Nearly twenty-nine percent (28.6) of the respondents traveling alone to Orleans County expend between \$16 - \$20 per day, per person on food and meals, 35.5% of business associates responding to the survey expend between \$16 - \$20; 25% of groups of relatives responding to the survey equally expend between \$11 - \$15 and \$16 - \$20; 30.8% of

FIGURE 4.18

Crosstabulation of Expense for Accommodations (Variable 20) by
Length of Stay (Variable 10)

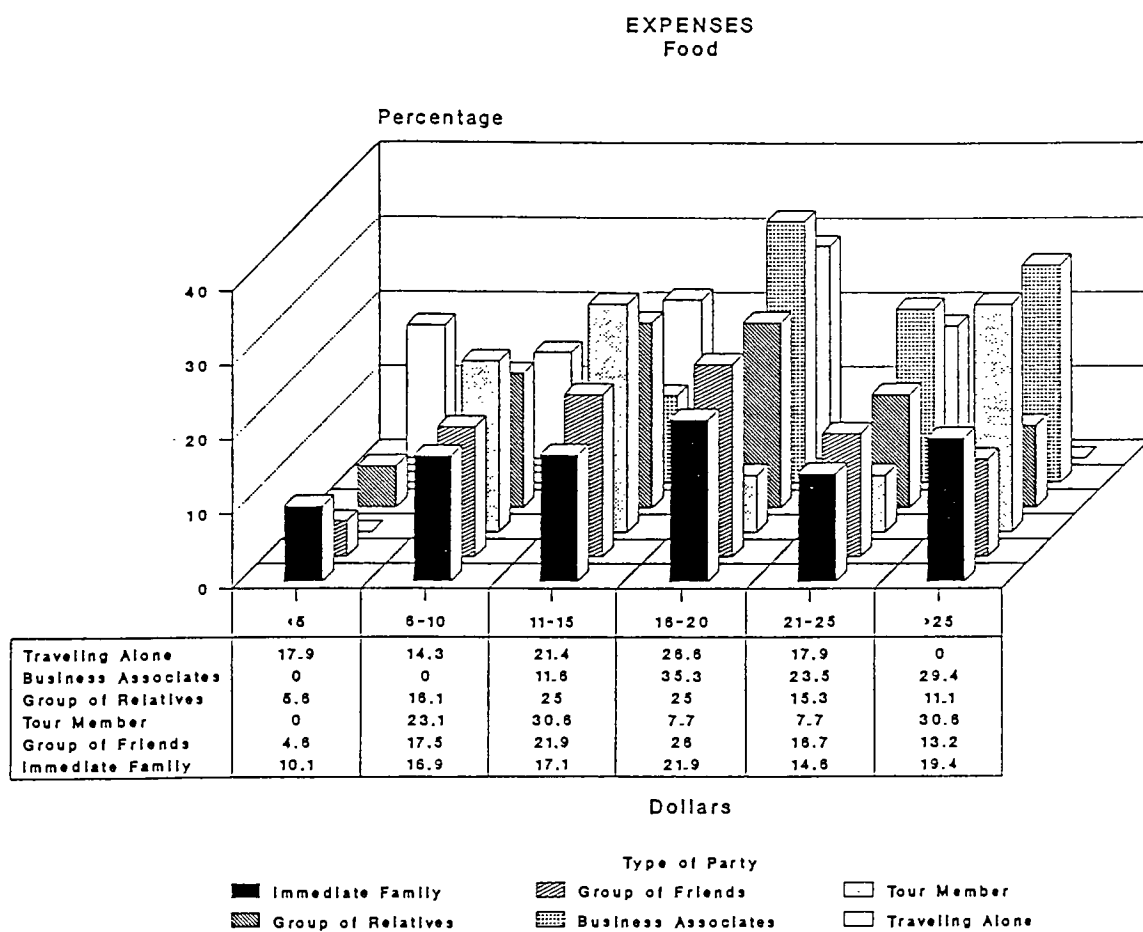


Per party per day

FIGURE 4.19

Crosstabulation of Expense for Food and Meals (Variable 21) by

Type of Party (Variable 01)



Per person per day

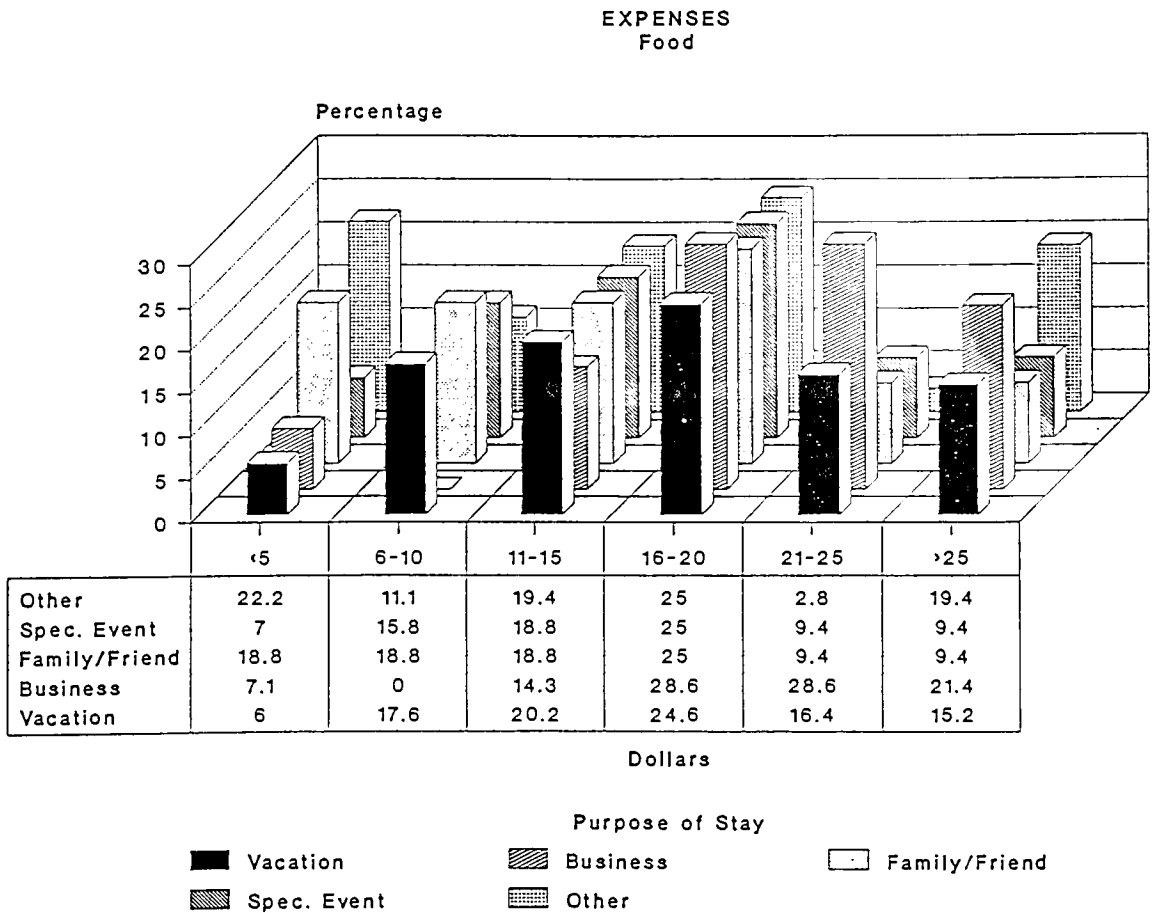
tour members responding to the survey expend \$11 - \$15; 26% of groups of friends responding to the survey expend \$16 - \$20; 21.9% of immediate families responding to the survey expend between \$16 - \$20.

Figure 4.20 illustrates the results of the crosstabulation of Expense for Food and Meals (Variable 21) and Purpose of Stay (Variable 09). Nearly twenty-five percent (24.6) of respondents traveling to Orleans County on vacation expend between \$16 - \$20 per day, per person on food purchases; 28.6% of those respondents on business equally expend between \$16 - \$20 and \$21 - \$25; 25% of the respondents visiting friends and family expend \$16 - \$20; 25% of the respondents visiting Orleans County for a specific event expend between \$16 - \$20; while 25% of the respondents visiting for "other" purposes expend between \$16 - \$20.

Figure 4.21 illustrates the results of the crosstabulation of Expense for Food and Meals (Variable 21) and Length of Stay (Variable 10). Twenty-five percent of the respondents visiting Orleans County for more than one week expend between \$11-\$15 per day, per person on food purchases; 28.1% of the respondents staying five to seven days expend between \$16 - \$20; 24.8% of the respondents staying three to five days expend between \$16 - \$20; 25.6% of the respondents staying one to three days expend \$16 - \$20; 21.5% of the respondents staying less than one day in Orleans County expend less than \$5.

FIGURE 4.20

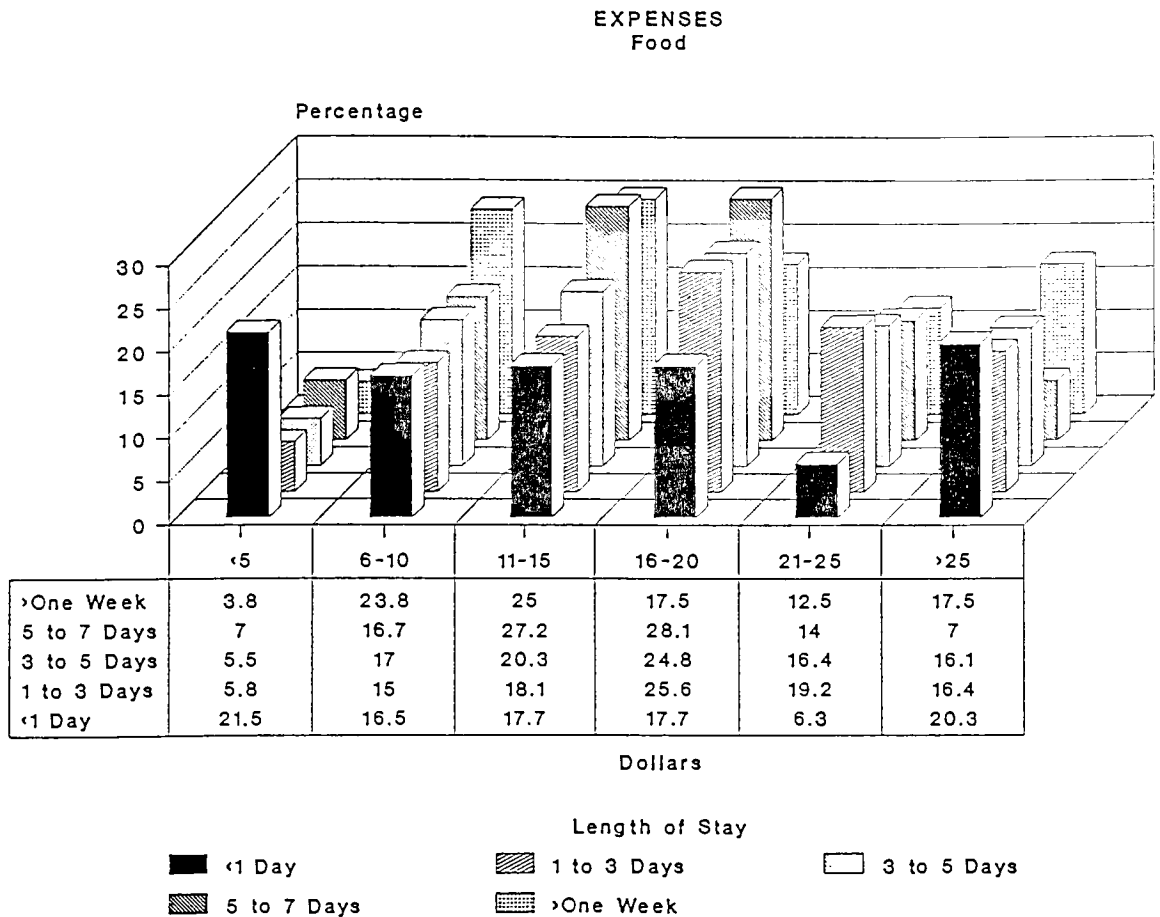
Crosstabulation for Food and Meals (Variable 21) by
Purpose of Stay (Variable 20)



Per person per day

FIGURE 4.21

Crosstabulation of Expense for Food and Meals (Variable 21) by
Length of Stay (Variable 10)



Per person per day

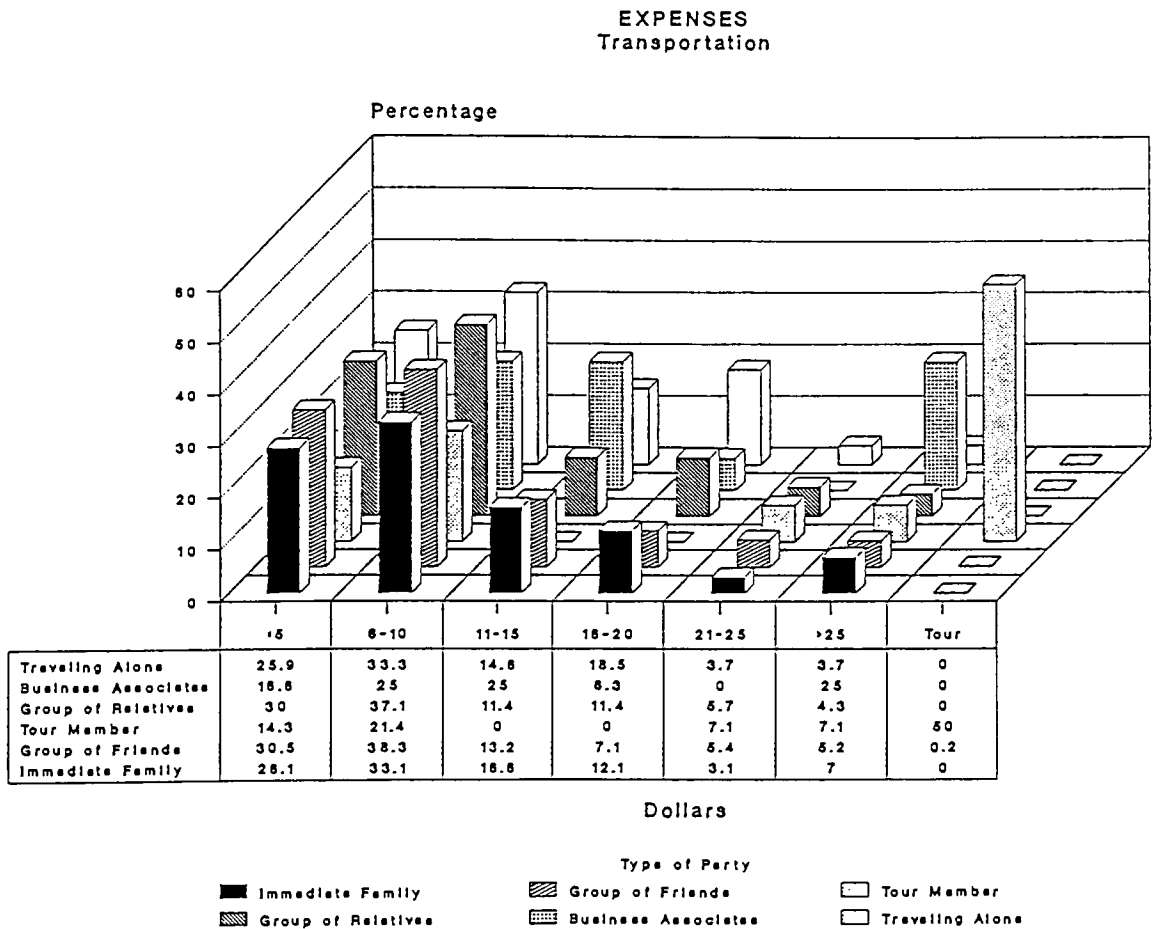
The spending patterns for transportation purchases by responding visitors to Orleans County were individually crosstabulated with each type of visiting party, purpose of stay, and length of stay, resulting in Figures 4.22, 4.23, and 4.24.

Figure 4.22 illustrates the results of the crosstabulation of Expense for Transportation (Variable 22) and Type of Party (Variable 01). Over thirty-three percent (33.3) of the respondents traveling alone to Orleans County expend between \$6 - \$10 per day, per party on transportation needs; 25% of responding business associates equally expend between \$6 - \$10, \$11 - \$15, and more than \$25; 37.1% of responding groups of relatives expend between \$6 - \$10; 21.4% of responding tour members expend between \$6 - \$10; 38.3% of responding groups of friends expend between \$6 - \$10; and, 33.1% of responding immediate families expend between \$6 - \$10.

Figure 4.23 illustrates the results of the crosstabulation of Expense for Transportation (Variable 22) and Purpose of Stay (Variable 09). Over thirty-six percent (36.1) of the respondents traveling to Orleans County on vacation expend between \$6 - \$10 per day, per party on transportation needs; 50% of the respondents traveling on business expend less than \$5; 47.1% of the respondents traveling to visit family and friends expend between \$6 - \$10; 34.4% of respondents visiting Orleans County for a specific event expend between \$6 - \$10; and, 31.6% of the respondents visiting for "other" purposes expend less than \$5.

FIGURE 4.22

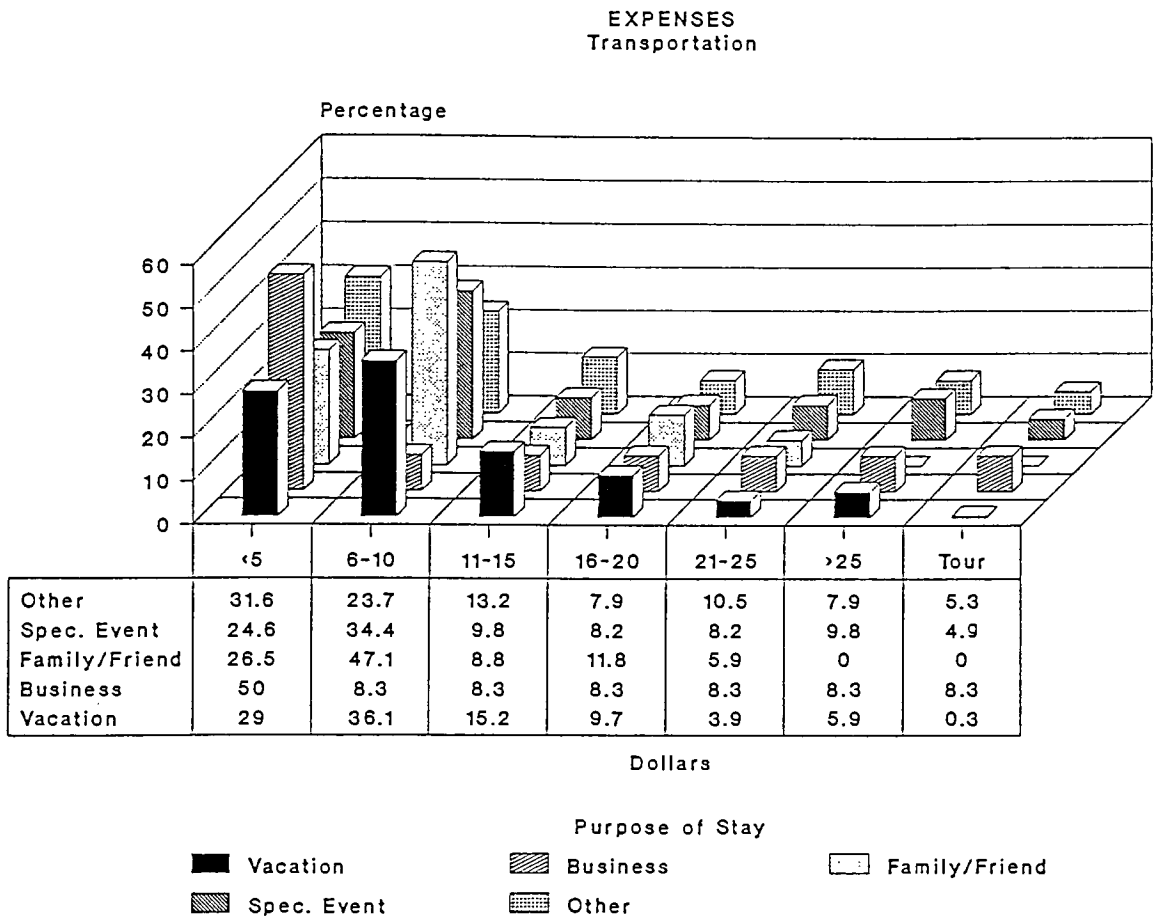
Crosstabulation of Expense for Transportation (Variable 22) by
Type of Party (Variable 01)



Per party per day

FIGURE 4.23

Crosstabulation of Expense for Transportation (Variable 22) by
Purpose of Stay (Variable 09)



Per party per day

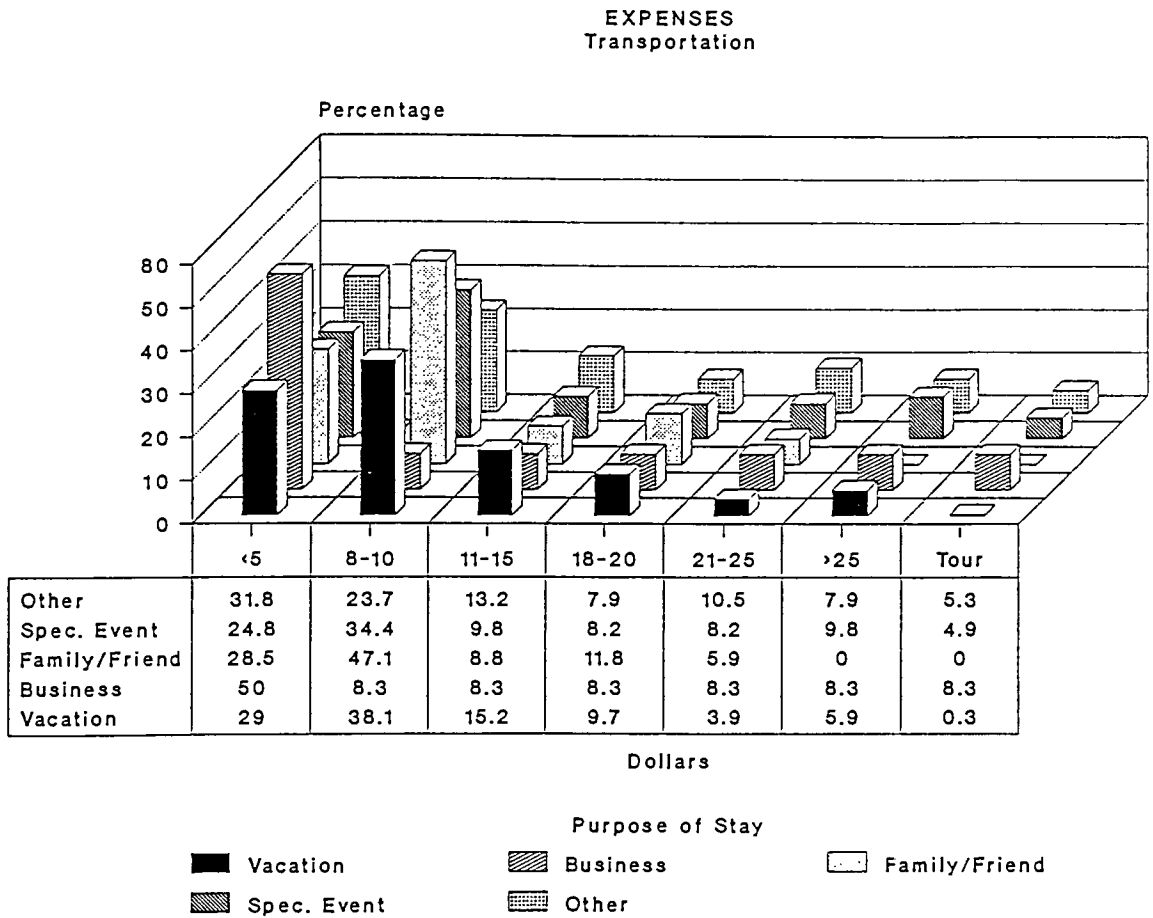
Figure 4.24 illustrates the results of the crosstabulation of Expense for Transportation (Variable 22) and Length of Stay (Variable 10). Nearly thirty percent (29.5) of the respondents visiting Orleans County for more than one week expend between \$6 - \$10 per day, per party on transportation needs; 33.6% of the respondent staying five to seven days expend \$6 - \$10; 37.6% of the respondents staying three to five days expend \$6 - \$10; 37.6% of the respondents staying one to three days expend \$6 - \$10; and, 41.9% of the respondents staying less than one day in Orleans County expend less than \$5.

The spending patterns for attractions and events by responding visitors to Orleans County were crosstabulated individually with each type of party, purpose of stay, and length of stay, resulting in Figures 4.25, 4.26, and 4.27.

Figure 4.25 illustrates the results of the crosstabulation of Expense for Attractions and Events (Variable 23) and Type of Party (Variable 01). Nearly forty-three percent (42.9) of the respondents traveling alone to Orleans County expend less than \$5 per day, per person on attractions and events; 58.8% of responding business associates expend more than \$25; 37.7% of responding groups of relatives expend more than \$25; 12.5% of responding tour members expend more than \$25; 33.1% of responding groups of friends expend more than \$25; and, 27.8% of responding immediate families visiting Orleans County expend less than \$5.

FIGURE 4.24

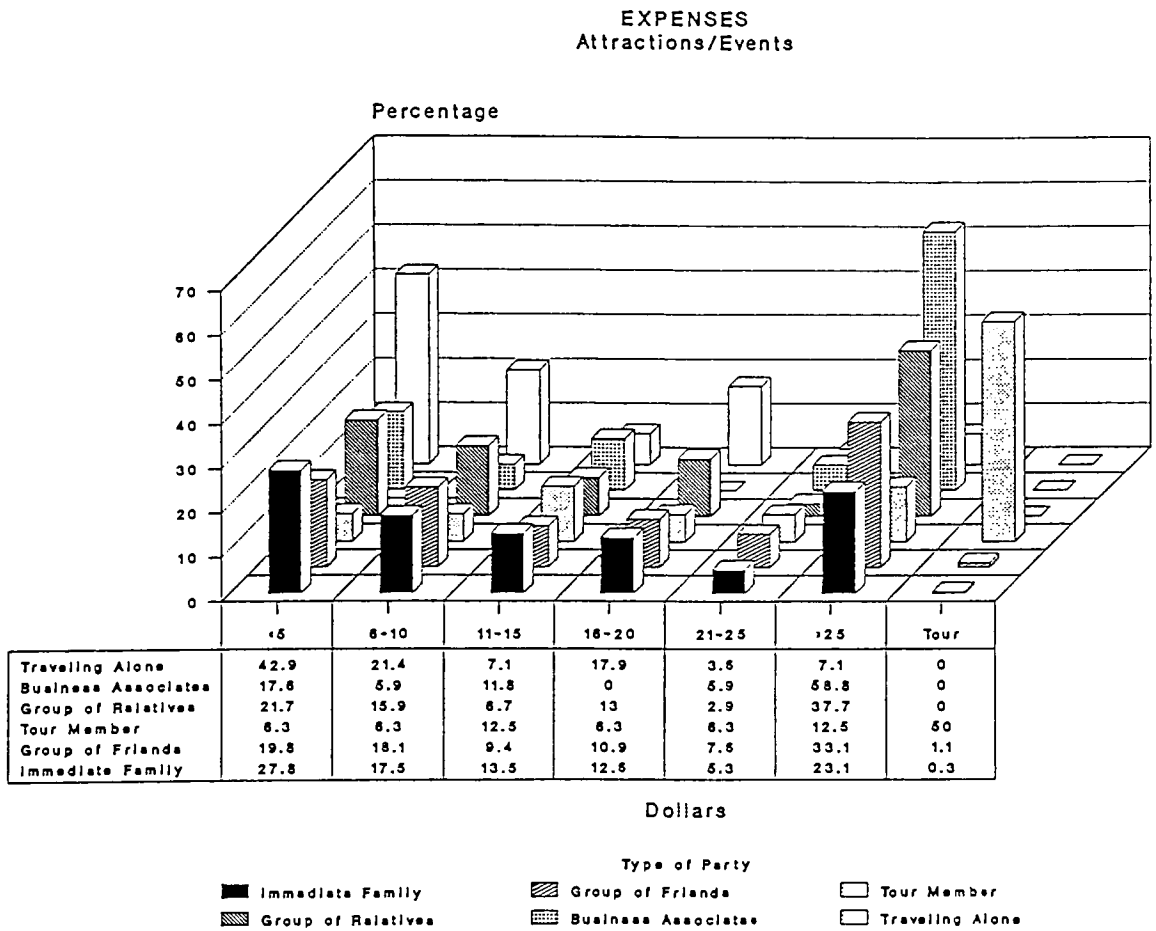
Crosstabulation of Expense of Transportation (Variable 22) by
Length of Stay (Variable 10)



Per party per day

FIGURE 4.25

Crosstabulation of Expense for Attractions and Events (Variable 23) by
Type of Party (Variable 01)



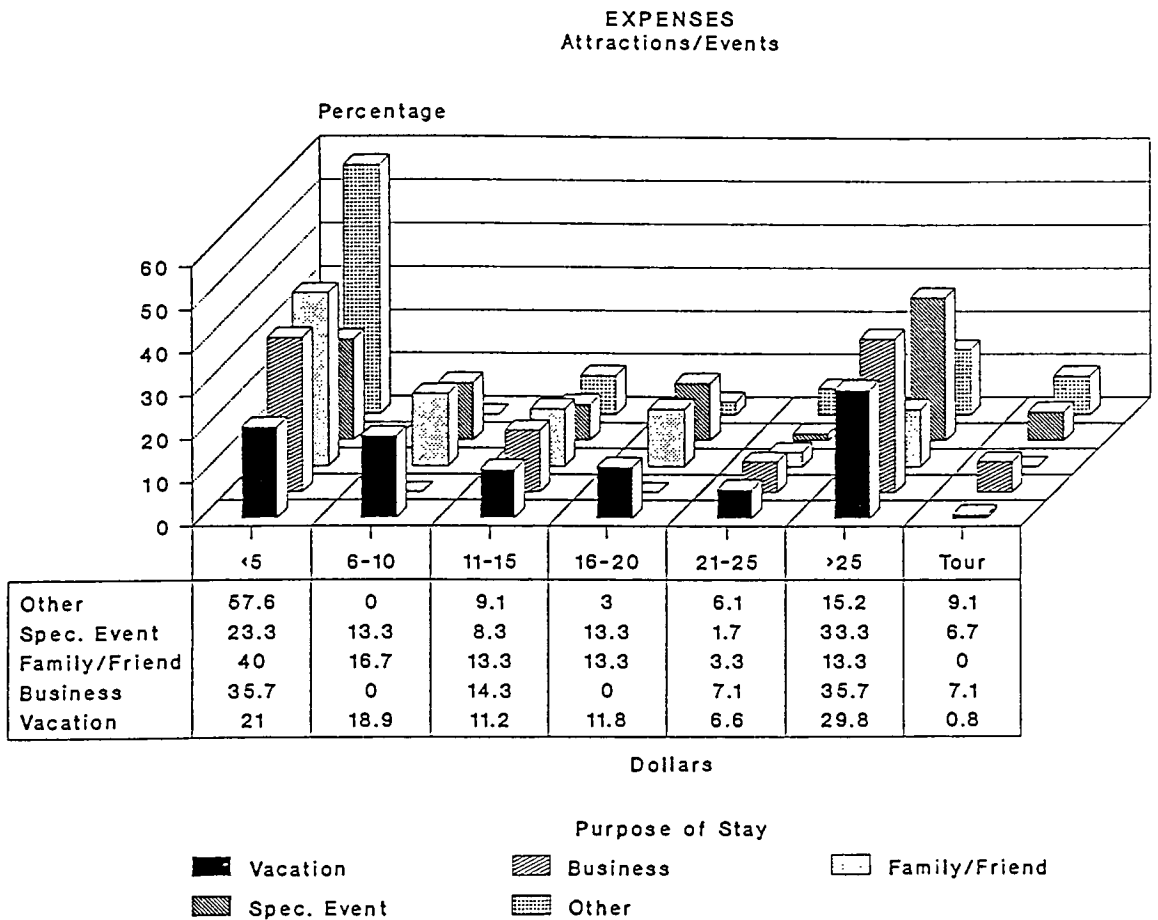
Per person per day

Figure 4.26 illustrates the results of the crosstabulation of Expense for Attractions and Events (Variable 22) and Purpose of Stay (Variable 09). Nearly thirty percent (29.8) of the respondents visiting Orleans County on vacation expend more than \$25 per day, per person on attractions and events; 35.7% of those respondents traveling on business equally expend less than \$5 and more than \$25; 40% of the respondents visiting family and friends expend less than \$5; 33.3% of the respondents traveling to Orleans County for a specific event spend more than \$25; and, 57.6% of the respondent traveling to Orleans County for "other" purposes expend less than \$5.

Figure 4.27 illustrates the results of the crosstabulation of Expense for Attractions and Events (Variable 23) and Length of Stay (Variable 10). Nearly thirty percent (29.5) of the respondents visiting Orleans County for more than one week expend more than \$25 per day, per person on attractions and events; 24.1% of the respondents staying five to seven days expend \$6 - \$10; 25.3% of the respondents staying three to five days expend more than \$25; 39.4% of the respondents staying one to three days expend more than \$25; and, 40% of the respondents staying Orleans County less than one day expend less than \$5.

FIGURE 4.26

Crosstabulation of Expense for Attractions and Events (Variable 23) by
Purpose of Stay (Variable 09)

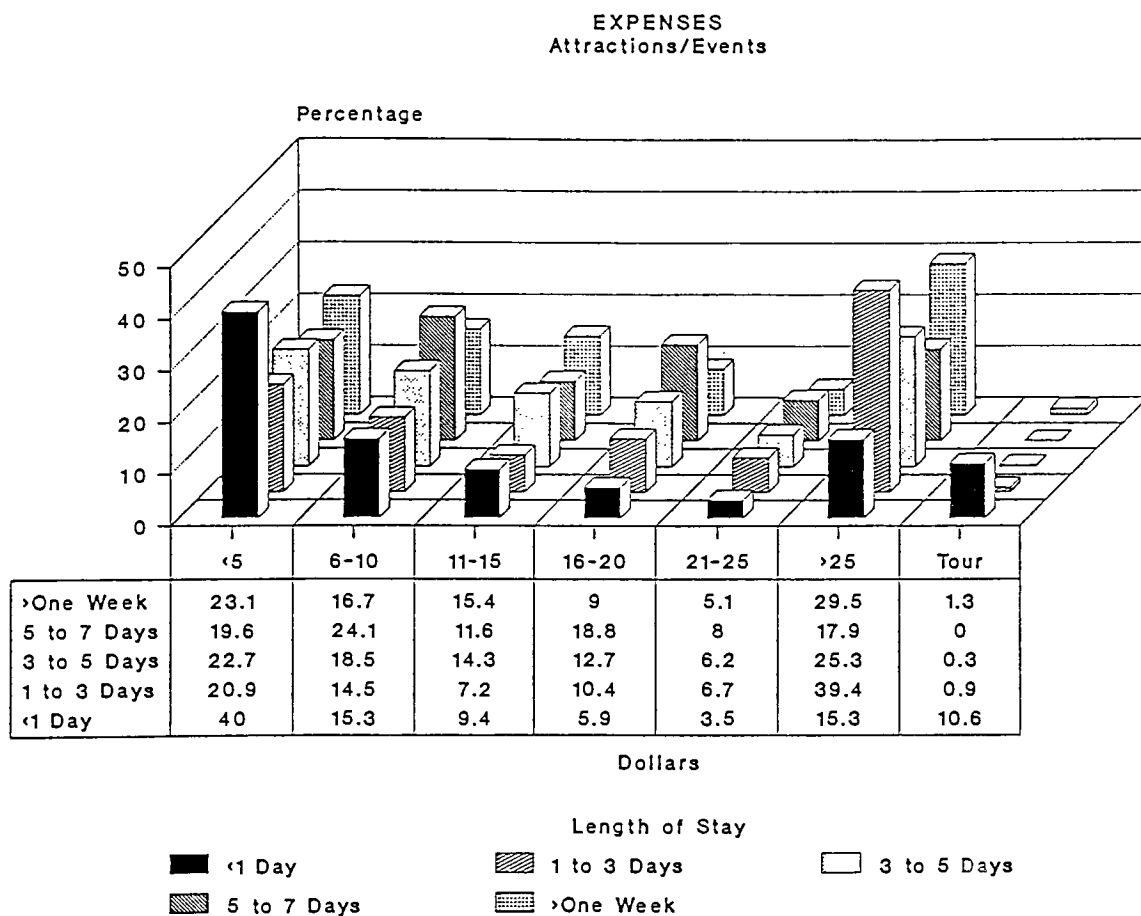


Per person per day

FIGURE 4.27

Crosstabulation of Expense for Attraction and Events (Variable 23) by

Length of Stay (Variable 10)



Per person per day

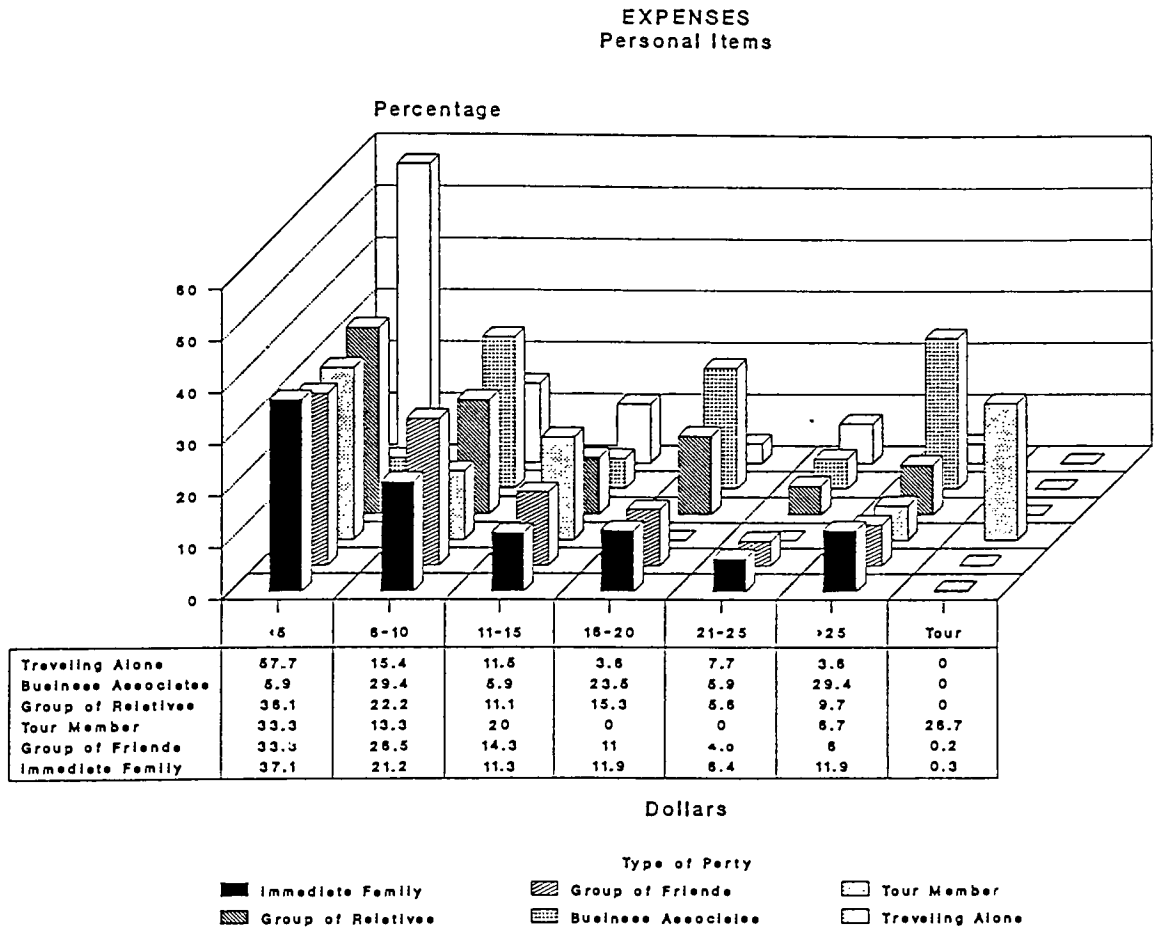
The spending patterns for personal items by responding visitors to Orleans County were crosstabulated individually with each type of party, purpose of stay, and length of stay, resulting in Figures 4.28, 4.29, and 4.30.

Figure 4.28 illustrates the results of the crosstabulation of Expense for Personal Items (Variable 24) and Type of Party (Variable 01). Nearly fifty-eight percent (57.7) of the respondents traveling alone to Orleans County expend less than \$5 per day, per person on personal items; 29.4% of the responding business associates equally expend between \$6 - \$10 and more than \$25; 36.1% of the responding groups of relatives expend less than \$5; 33.3% of responding tour members spend less than \$5; 33.3% of responding groups of friends expend less than \$5; and, 37.1% of responding immediate families visiting Orleans County expend less than \$5 during their stay.

Figure 4.29 illustrates the results of the crosstabulation of Expense for Personal Items (Variable 24) and Purpose of Stay (Variable 09). Over thirty-two percent (32.8) of the respondents traveling to Orleans County on vacation expend less than \$5 per day, per person on personal items; 46.2% of the respondents traveling on business expend less than \$5; 51.5% of the respondents visiting family and friends expend less than \$5; 43.1% of the respondents traveling to Orleans County for a specific event expend less than \$5; and, 50% of those traveling to Orleans County for "other" purposes expend less than \$5.

FIGURE 4.28

Crosstabulation for Expense for Personal Items (Variable 24) by
Type of Party (Variable 01)

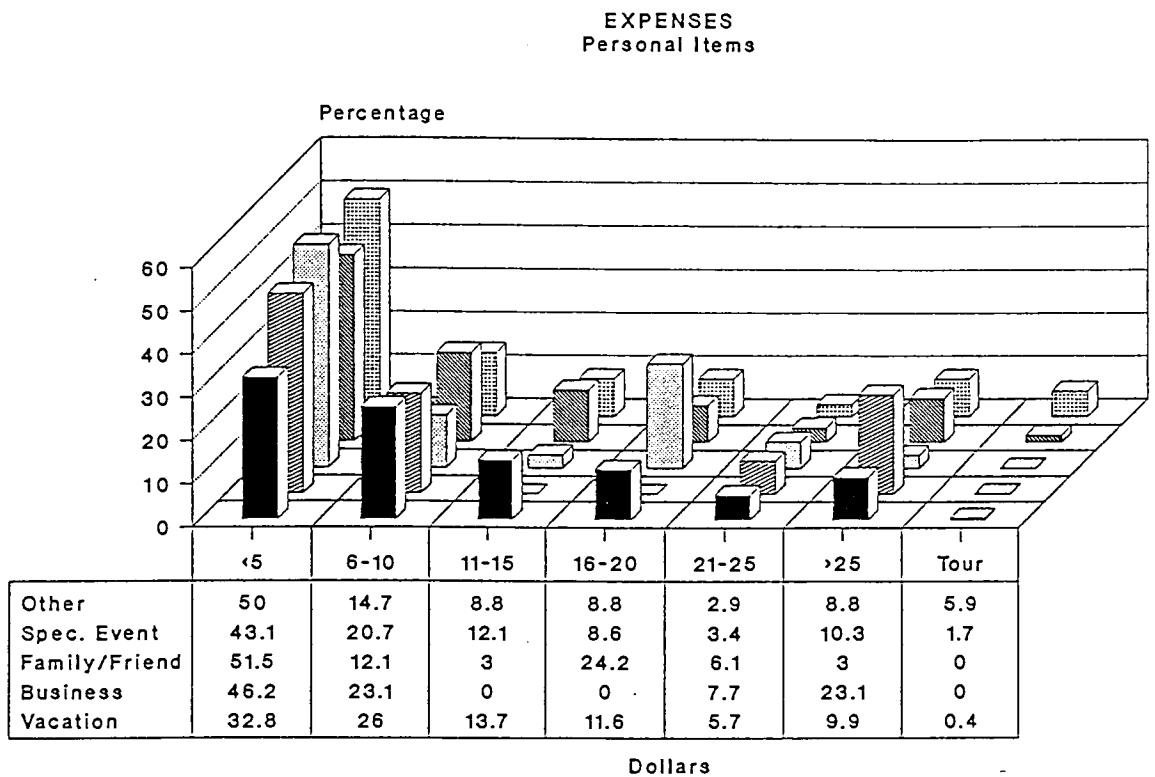


Per person per day

FIGURE 4.29

Crosstabulation of Expense for Personal Items (Variable 24) by

Purpose of Stay (Variable 09)



Per person per day

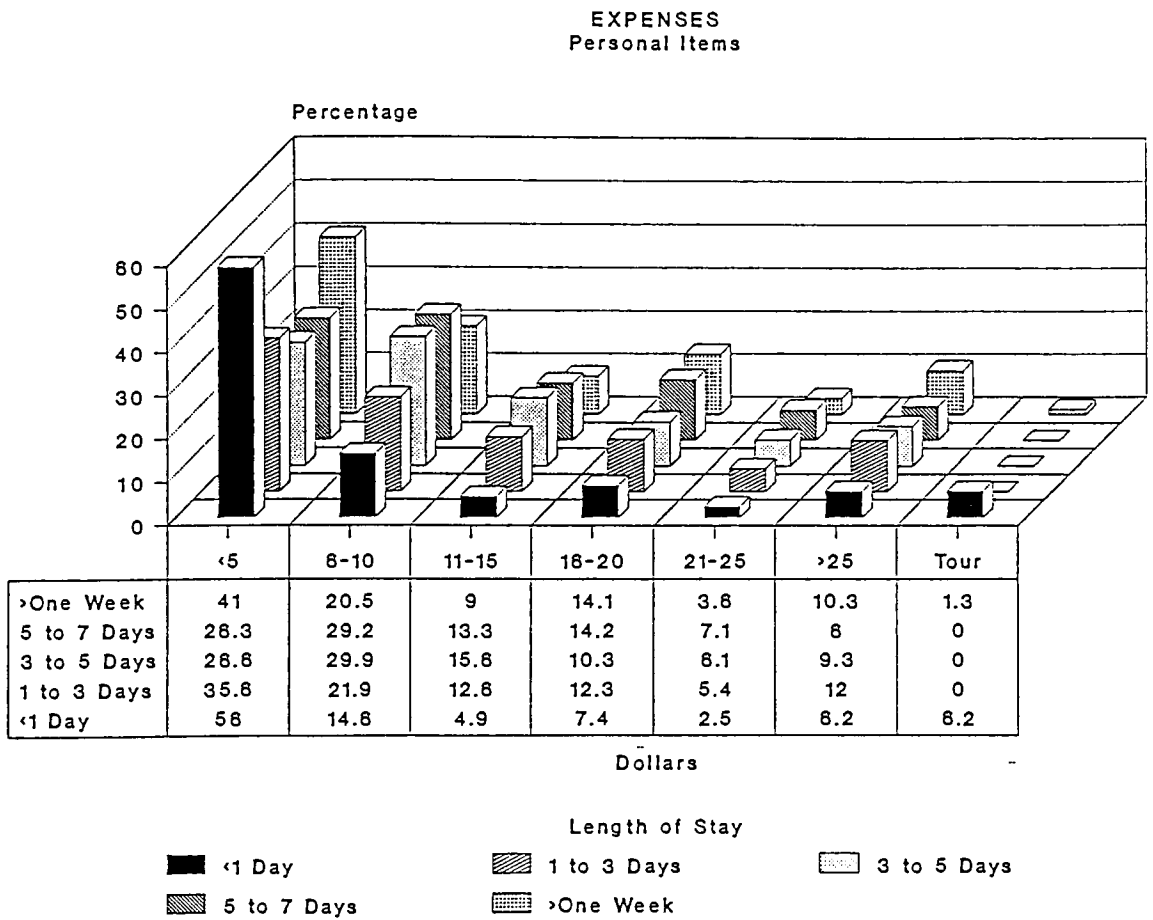
Figure 4.30 illustrates the results of the crosstabulation of Expense for Personal Items (Variable 24) and Length of Stay (Variable 10). Forty-one percent of the respondents visiting Orleans County for more than one week expend less than \$5 per day, per person on personal items; 29.2% of the respondents staying five to seven days expend between \$6 \$10; 29.9% of the respondents staying three to five days expend between \$6 \$10; 35.6% of the respondents staying one to three days expend less than \$5; and, 58% of the respondents staying less than one day in Orleans County expend less than \$5.

Total Expenditures and Estimated Tax Revenues

The total party expenditures and estimated tax revenues using the highest percentage response from each of the expenditure categories and the average party size. The average total party expenditure per diem is based on the assumption that each party member has equal expenses and participates in the same activities while staying in Orleans County. The weekly and monthly potential tax revenue projections are based on the assumption that there is a consistent tourist season year-round in Orleans County.

FIGURE 4.30

Crosstabulation for Personal Items (Variable 24) by
Length of Stay (Variable 10)



Per person per day

Figures 4.31 and 4.32 represent the total tourist expenditures in Orleans County segmented by type of expense: accommodations, food, transportation, attractions and events, and personal items. (Based on an average party of four.)

Figure 4.31 illustrates total party expenditures per diem in percentage by expense segment. Forty-five percent of total expenditures is for attractions and events; 32% of expenses is related to food purchases; 10% of expenses is related to accommodation costs; 9% of expenses is related to the purchase of personal items; and the final 4% of expenses is attributed to transportation costs incurred by the visitor while staying in Orleans County.

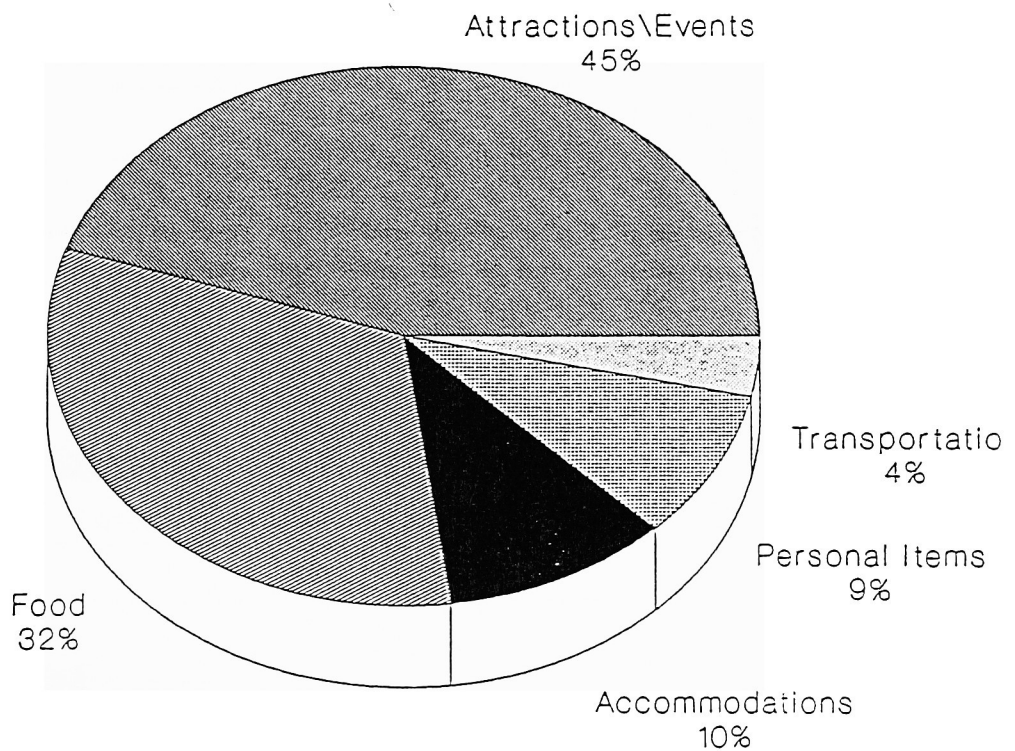
Figure 4.32 illustrates total party expenditures per diem in dollar amounts. An average party of four persons visiting Orleans County expend an estimated \$23 per day on accommodations, \$72 per day on food, \$8 per day on transportation needs, \$100 per day for attractions and events, and \$20 per day on personal items, totaling \$232 per party of four.

Figures 4.33-4.36 illustrate estimated revenue and potential tax revenue that is generated by tourist spending in Orleans County. Figure 4.33 illustrates an estimated \$22,300 would be expended by every one hundred parties of four visiting the County.

FIGURE 4.31

Total Party Expenditure Per Diem (Percentage)

Total Expenditure Per Diem by Percentage Party of Four

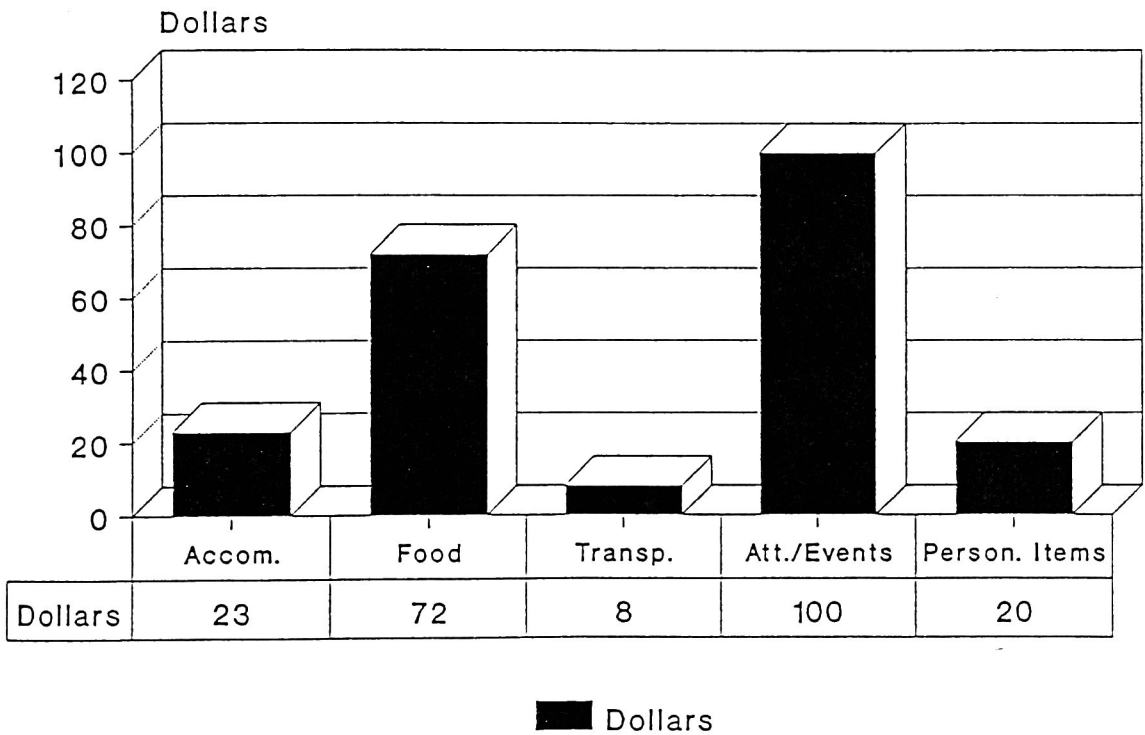


Based on Average Spending Patterns

FIGURE 4.32

Total Party Expenditure Per Diem (Dollar)

Total Expenditure Per Diem in Dollars
Party of Four

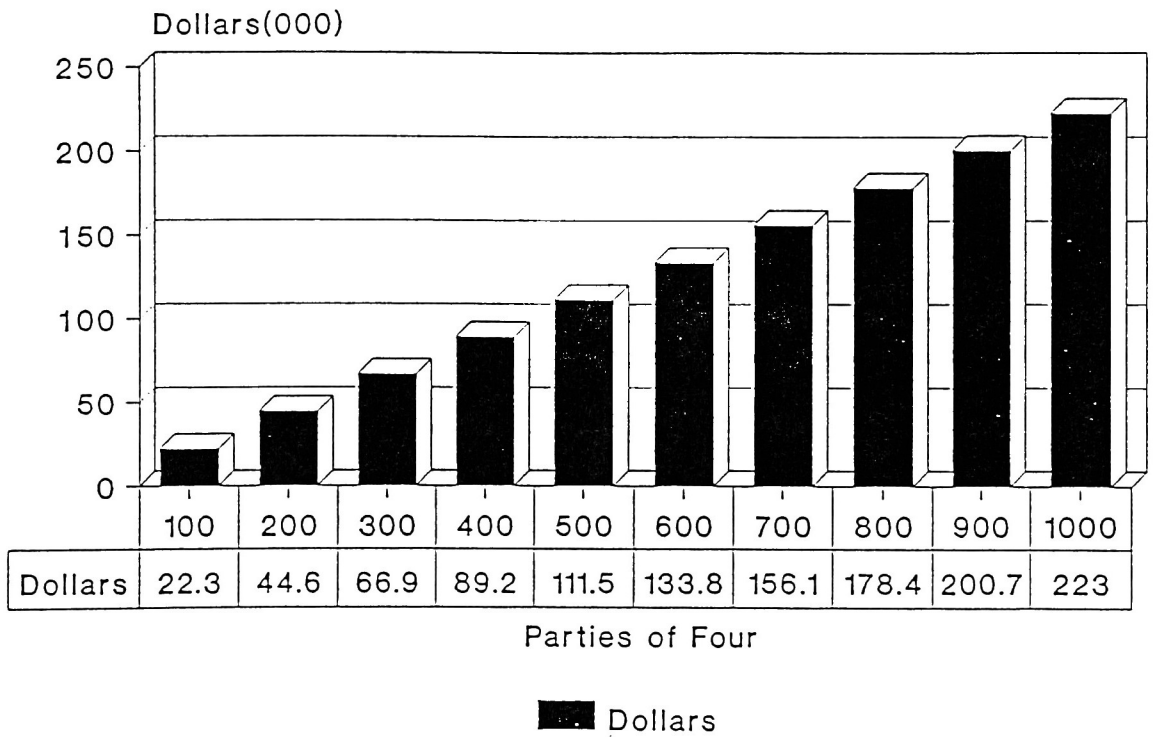


used on Average Spending Patterns

FIGURE 4.33

Potential Tourism Revenue Generated Per Diem

ORLEANS COUNTY Potential Tourism Revenue Per Diem



Avg. Spending Pattern per Party of Four

Each visiting party of four spending an average of \$223 per day in Orleans County will generate and estimated \$6.69 in potential tax revenue, based on 3% local tax. Therefore, for every one hundred parties of four visiting the County, an estimated \$669 in potential tax revenue is generated. Figures 4.34, 4.35, and 4.36 illustrate the potential tourism generate tax revenue per diem, per week, and per month.

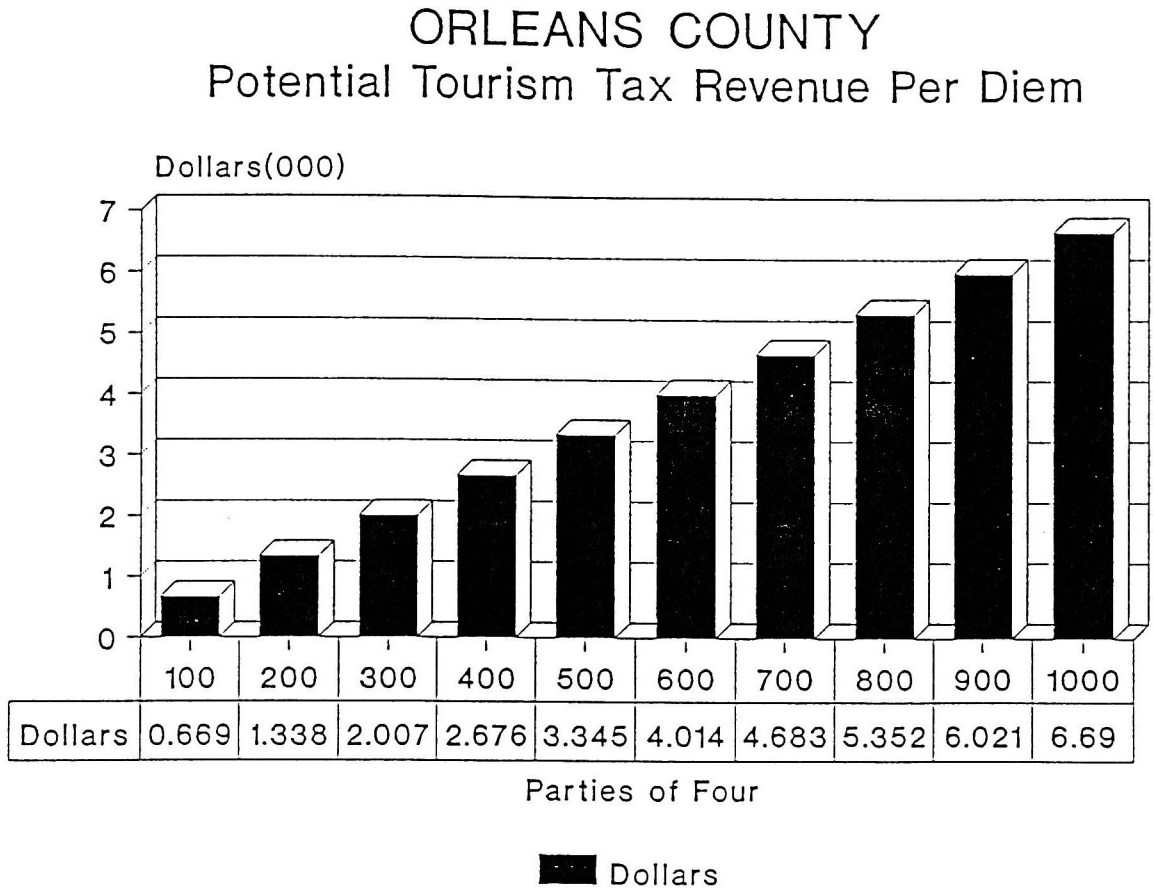
Factor Analysis of The Survey Instruments

Several attempts were made to establish a commonality of underlying tourist characteristics among the respondents by utilizing the SPSSx Factor Analysis Computer Program designed to statistically identify a relatively small number of factors that can be used to represent relationships among sets of many interrelated variables.

The survey instrument consisted of twenty-seven variables with forty-six sub-variables, an excess number for the factor analysis program to accommodate. After further discussion with an SPSSx Program Analyst at RIT, it was concluded that the design of the survey instrument did not lend itself to this form of statistical analysis.

FIGURE 4.34

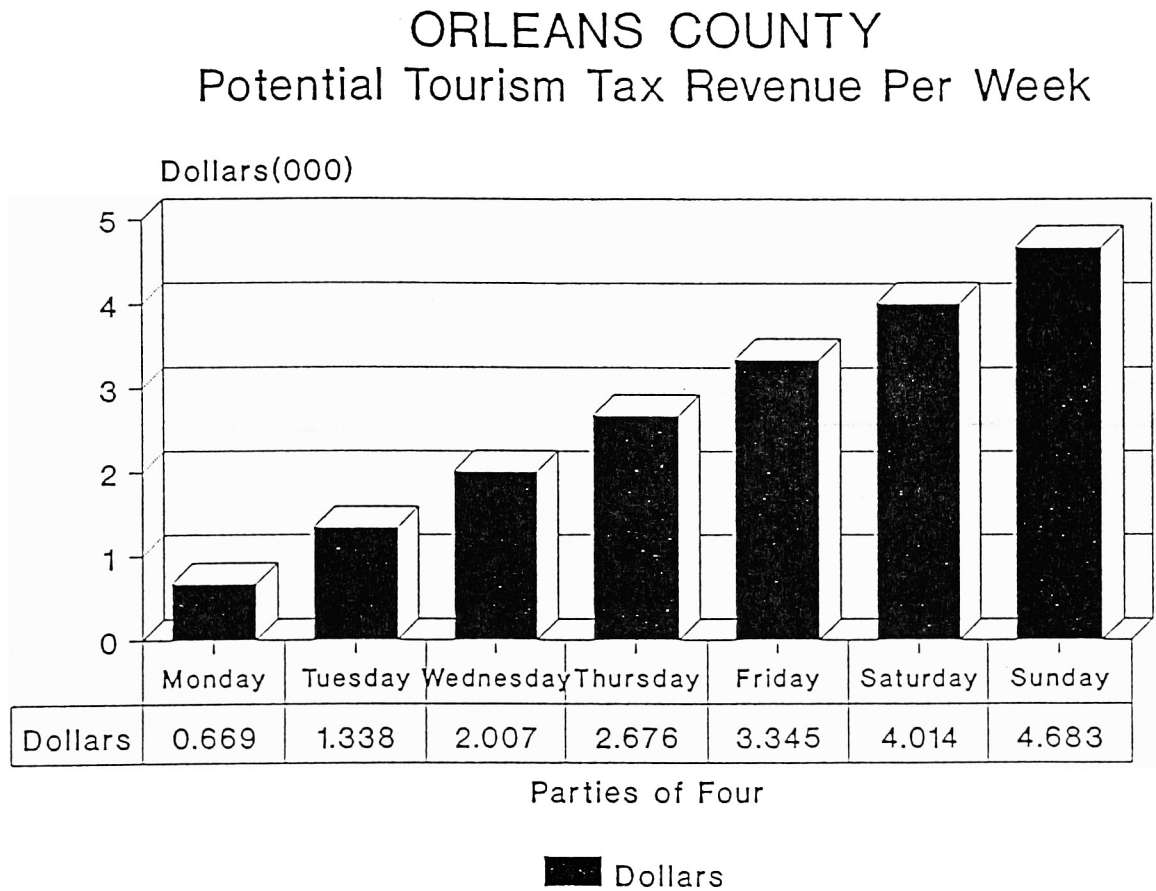
Potential Tourism Tax Revenue Generated Per Diem



Avg. Spending Pattern Party of Four

FIGURE 4.35

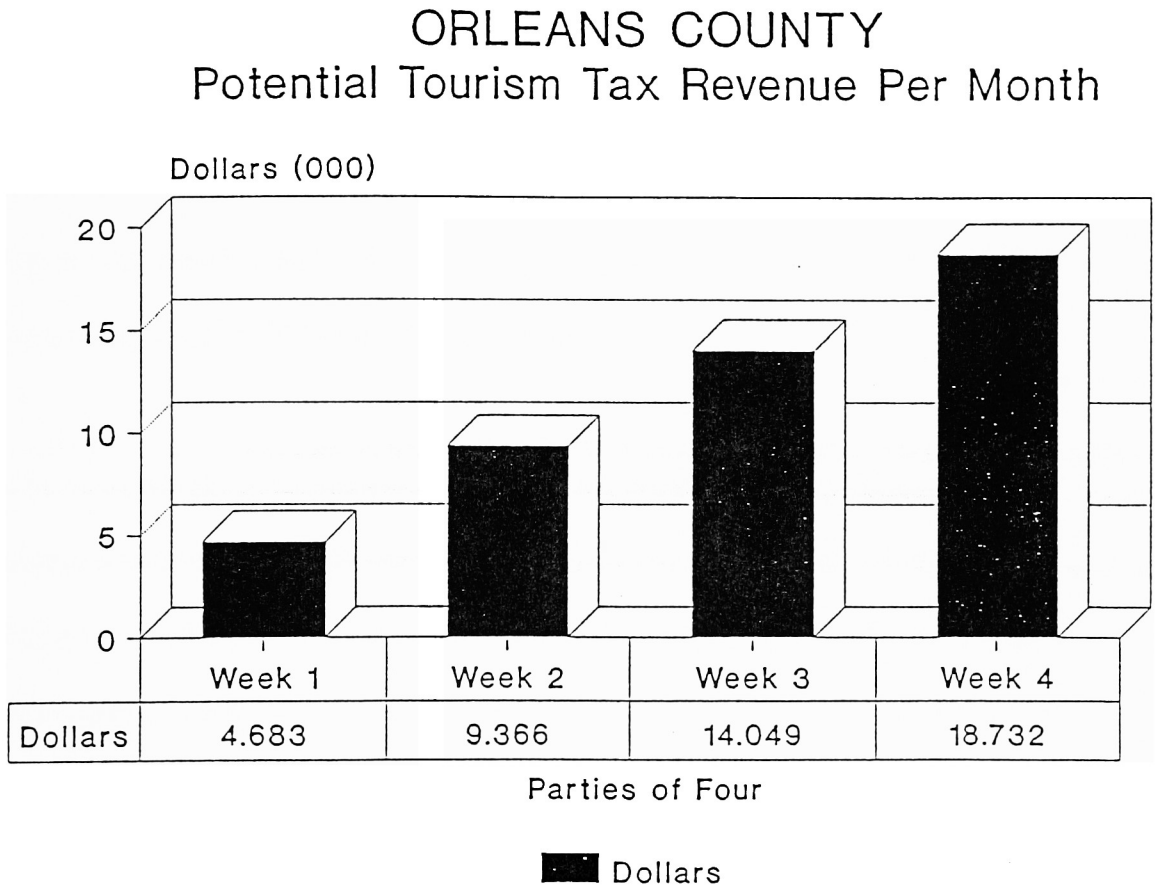
Potential Tourism Tax Revenue Generated Per Week



Based on an Average of 100 parties/day

FIGURE 4.36

Potential Tourism Tax Revenue Generated Per Month



Based on an Average of 100 parties/day

CHAPTER V

Summary, Conclusions, and Recommendations

Summary

The aim of this research is to (1) identify primary and secondary tourist markets of Orleans County in terms of monies spent, awareness of tourist amenities, and general demographic characteristics, and (2) estimate potential tax revenue generated from tourism spending in the County. It is also hoped that this research will lead to the development of a centralized database to be used as a tourism decision-making tool by Orleans County officials.

To achieve this goal, survey instruments were developed and administered to three tourist markets (potential, historical, and current) of Orleans County. Prior to conducting the statistical analysis, the results from the different survey instruments were aggregated based on the reasons cited in Chapter IV. A means and mode analysis was performed to identify the common tourist characteristics and preferences as they relate to Orleans County and the amenities offered within the County. A crosstabs analysis was performed to establish potential relationships between several variable pairs. A factor analysis was attempted to identify any underlying constructs resulting from the principle components analysis on the resultant data.

Conclusions

The conclusions which may be drawn from reflecting on the research question addressed in the study are as follows. The central question asked:

"What are the demographic characteristics of the tourist population attracted to Orleans County, New York?"

The results generated from this study respond to the central question by researching the characteristics of three tourist markets: (a) persons who requested information on Orleans County and actually visited the area (Potential Market); (b) persons who stayed in Orleans County and registered at either a motel, lodge, campground, bed and breakfast, or for a state fishing license prior to July 1990 (Historical Market); and (c) persons who visited Orleans County during the months of July and August of 1990 (Current Market). The compiled results from the survey instruments for the general tourist population are as follows:

Based on the frequency of responses, the typical visitor to Orleans County:

- a) is married with two children and resides in Pennsylvania;
- b) is retired with an annual household income between \$20,001 and \$30,000;
- c) travels by personal vehicle;
- d) travels to the area on vacation, stays three to five days at a campground, with a group of four friends;
- e) relies on family and/or friends as their primary source of information;
- f) is aware of the County's fishing activities, boating activities, camping facilities, the Erie Canal and Seaway Trail as the five most popular tourist attractions;

- g) visits or participates in fishing, boating, camping, the Erie Canal and Seaway Trail as the five most popular tourist attractions;
- h) expends \$16-\$30 per day, per party on accommodations;
- i) expends \$16-\$20 per day, per person on food and meals;
- j) expends \$6-\$10 per day, per party on transportation needs;
- k) expends more than \$25 per day, per person on attractions and events;
- l) expends less than \$5 per day, per person on personal items; and,
- m) rates overall satisfaction an eight on a scale of one to ten.

This research also intended to identify specific market characteristics established by the different types of party segments that are attracted to Orleans County. The compiled results from the survey instruments for each type of party (immediate family, group of relatives, groups of friends, business associates, tour members, and visitors traveling alone) are as follows:

1. **Traditional Families** travel to Orleans County from out-of-state seeking a relatively inexpensive camping vacation, bringing their own food and supplies to minimize costs. They enjoy leisurely activities of fishing and boating during their brief stay. Based on the frequency of responses, traditional families traveling to Orleans County:

- a) are married with two children and reside in Pennsylvania;
- b) are retired with an annual household income between \$30,001 and \$40,000;
- c) travels by personal vehicle;
- d) travel to the area as their primary destination on vacation, stays one to three days at a campground in a party of two;
- e) rely on family and/or friends as their primary source of information;
- f) are aware of the County's fishing activities, camping facilities, boating activities, the Seaway Trail and the Erie Canal as the five most popular tourist attractions;

- g) visit or participate in fishing, camping, the Seaway Trail, the Erie Canal and the scenic waterways and byways as the five most popular tourist attractions;
- h) expend less than \$15 per day, per party on accommodations;
- i) expend between \$16-\$20 per day, per person on food and meals;
- j) expend between \$6-\$10 per day, per party on transportation needs;
- k) expend less than \$5 per day, per person on attractions and events;
- l) expend less than \$5 per day, per person on personal items; and,
- m) rates overall satisfaction an eight on a scale of one to ten.

2. **Close Relatives** travel to Orleans County from out-of-state seeking a relatively inexpensive camping vacation, bringing their own food and supplies to minimize costs. They enjoy leisurely activities of fishing and boating during their stay. Based on the frequency of responses, close relatives traveling to Orleans County:

- a) are married with two children and reside in Pennsylvania;
- b) are retired with an annual household income between \$20,001 and \$30,000;
- c) travels by personal vehicle;
- d) travel to the area as their primary destination on vacation, stays three to five days at a campground in a party of four;
- e) rely on mailed requests as their primary source of information;
- f) are aware of the County's fishing activities, boating activities, camping facilities, the Seaway Trail and the Erie Canal as the five most popular tourist attractions;
- g) visit or participate in fishing, boating, camping, the Seaway Trail, and the scenic waterways and byways as the five most popular tourist attractions;
- h) expend between \$16-\$30 per day, per party on accommodations;
- i) expend equally between \$11- \$15 and \$16-\$20 per day, per person on food and meals in Orleans County;
- j) expend between \$6-\$10 per day, per party on transportation needs;
- k) expend more than \$25 per day, per person on attractions and events;
- l) expend less than \$5 per day, per person on personal items; and,
- m) rates overall satisfaction an eight on a scale of one to ten.

3. **Traveling Chums** visit Orleans County from out-of-state to enjoy a fishing vacation. They stay at campgrounds and bring their own food and supplies to minimize costs. The major expenses incurred during their brief stay, include the fishing license registration and fees for employing fishing charter services. Based on the frequency of responses, traveling chums visiting Orleans County:

- a) are married with two children and reside in Pennsylvania;
- b) are retired with an annual household income between \$20,001 and \$30,000;
- c) travels by personal vehicle;
- d) travel to the area as their primary destination on vacation, stays one to three days at a campground in a party of four;
- e) rely on family and/or friends as their primary source of information;
- f) are aware of the County's fishing activities, boating activities, camping facilities, the Erie Canal and the Seaway Trail as the five most popular tourist attractions;
- g) visit or participate in fishing, boating, camping, the Seaway Trail, and the scenic waterways and byways as the five most popular tourist attractions;
- h) expend between \$16-\$30 per day, per party on accommodations;
- i) expend between \$16-\$20 per day, per person on food and meals;
- j) expend between \$6-\$10 per day, per party on transportation needs;
- k) expend more than \$25 per day, per person on attractions and events;
- l) expend less than \$5 per day, per person on personal items; and,
- m) rates overall satisfaction an eight on a scale of one to ten.

4. **Corporate Companions** travel to Orleans County from out-of-state for a fishing vacation. They stay at hotels or motels and purchase the majority of their food and supplies in the County. Major expenses incurred during their brief stay, include their accommodations, fishing license registrations and fees

for employing fishing charter services. Based on the frequency of responses, corporate companions traveling to Orleans County:

- a) are married with two children and reside in Pennsylvania;
- b) are professional with an annual household income greater than \$80,000;
- c) travels by personal vehicle;
- d) travel to the area as their primary destination on vacation, stays one to three days at a hotel or motel in a party of four;
- e) rely on family and/or friends as their primary source of information;
- f) are aware of the County's fishing activities, boating activities, the Seaway Trail, the Erie Canal and camping facilities as the five most popular tourist attractions;
- g) visit or participate in fishing, boating, scenic waterways and byways, the Apple Grove Inn and the Seaway Trail as the five most popular tourist attractions;
- h) expend equally between \$16-\$30 and greater than \$75 per day, per party on accommodations;
- i) expend between \$16-\$20 per day, per person on food and meals;
- j) expend equally between \$6-\$10, \$11-\$15 and greater than \$25 per day, per party on transportation needs;
- k) expend more than \$25 per day, per person on attractions and event;
- l) expend equally between \$6-\$10 and greater than \$25 per day, per person on personal items; and,
- m) rates overall satisfaction an eight on a scale of one to ten.

5. **Tour Members** travel to Orleans County from out-of-state by tour bus. Staying just the day, the majority of costs included by "tour-goers" are included in the initial price of the tour package. They visit the Apple Grove Inn and enjoy a mule-drawn ride down the canal. Tours also pass through one of the County's wildlife refuges. Based on the frequency of responses, tour members traveling to Orleans County:

- a) are married with either no children or two children and reside in Pennsylvania;

- b) are retired with an equal annual household income of less than \$20,000 and between \$20,001 and \$30,000;
- c) travels by tour bus;
- d) travel to the area as their primary destination on vacation, stay less than one day, and travel in a party greater than forty;
- e) relies on a retail travel agents as their primary source of information;
- f) are aware of the County's Canal Packet Tour, Apple Grove Inn, the Erie Canal, the Seaway Trail and fishing activities as the five most popular tourist attractions;
- g) visit or participate in the Apple Grove Inn, the Canal Packet Tour, the Erie Canal, the Wildlife Refuges and fishing as the five most popular tourist attractions;
- h) expend between \$16-\$30 per day, per party on accommodations or these costs are included in the price of the tour;
- i) expend between \$11-\$15 per day, per person on food and meals or these costs are included in the price of the tour;
- j) indicate that the expense for transportation is included in the price of the tour;
- k) indicate that the expense for attractions and events are included in the price of the tour;
- l) expend less than \$5 per day, per person on personal items; and,
- m) rates overall satisfaction a ten on a scale of one to ten.

6. **Lone Visitors** travel to Orleans County from within New York State seeking a relatively inexpensive vacation. They stay at hotels or motels and purchase some food and a few supplies in the County. They enjoy leisurely activities of fishing and boating during their brief stay. Based on the frequency of responses, lone visitors traveling to Orleans County:

- a) are married with no children and reside in New York;
- b) are equally professionals and retired persons with an annual household income less than \$20,000;
- c) travels by personal vehicle;
- d) travel to the area as their primary destination on vacation, stays one to three days at a hotel or motel;
- e) rely on mailed requests as their primary source of information;
- f) are aware of the County's fishing activities, the Erie Canal, boating activities, the Seaway Trail, and camping facilities as the five most

- popular tourist attractions;
- g) visit or participate in fishing, the Erie Canal, boating, camping and the Historic Village Inn as the five most popular tourist attractions;
- h) expend between \$31-\$45 per day, per party on accommodations;
- i) expend between \$16-\$20 per day, per person on food and meals;
- j) expend between \$6-\$10 per day, per party on transportation needs;
- k) expend less than \$5 per day, per person on attractions and events;
- l) expend less than \$5 per day, per person on personal items; and,
- m) equally rates overall satisfaction a seven, eight, and ten on a scale of one to ten.

The second component of this research aimed at identifying the potential tax revenue generated from tourism spending in Orleans County. The assumptions outlined in Chapter IV were used to calculate the figures outlined in the following section.

The average total expenditure per diem*, based on the average party of four, are as follows:

- a) 45% (\$100) of total expenditures is for attractions and events;
- b) 32% (\$72) of total expenditures is related to food purchases;
- c) 10% (\$23) of total expenditures is for accommodation costs;
- d) 9% (\$20) of total expenditures is for personal items; and,
- e) 4% (\$8) of total expenditures is attributed to transportation costs incurred while visiting Orleans County.

* Average total party expenditure per diem is \$223.

Each visiting party of four to Orleans County spending an average of \$223 per day will generate an estimated \$6.69 in potential tax revenue. (Based on 3% local tax.)

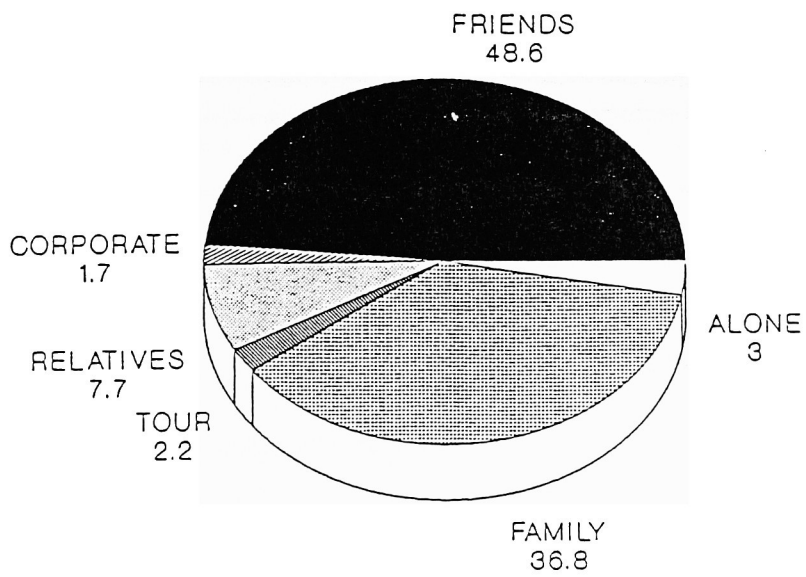
In summation, the data reconfirmed that the primary market is attracted to Orleans County for its fishing and boating activities. Traveling chums, close relatives, traditional families constitute this market which is seeking a relatively inexpensive vacation. These visitors come to the area from out-of-state usually for a fishing derby or a similar event. They stay at campgrounds, bringing their own food and supplies to help minimize the cost. The only major expenses incurred by this market are for the fishing license registration and fees for chartering a fishing boat.

The data also revealed potential opportunities in an emerging secondary market-corporate companions. Figure 5.01 illustrates the representation of this market with the total tourist population. This market is primarily attracted to the Orleans County for its fishing and boating activities as well, however, corporate companions expend far greater amounts of money in the County than any other particular market segment. They prefer hotel or motel lodging, rather than camping, and frequently patronize the various eating establishments in the County, rather than import their own food. This market also incurs the cost of the fishing license registration and fees associated with chartered fishing boats.

FIGURE 5.01

Market Segments (Percentage)

MARKET SEGMENTS



It is recommended that Orleans County actively promote its tourist amenities to the corporate companion market which will produce a proportionally greater return on advertising investment. The suggested procedure to substantiate this market segment and increase tourist traffic is as follows:

1. Identify major corporations located in the Mid-Atlantic Region and distribute Orleans County literature to the respective corporate travel departments or agencies acting thereof;
2. Organize a function to host corporate groups from the Rochester-Buffalo areas for a day which will serve as an opportunity to familiarize these persons with the County's tourist amenities;
3. Design a "Corporate Companions Package" to incorporate the cost of accommodations, fishing license registration and charting fees, a dinner at the Historic Village Inn or Apple Grove Inn, and a visit to one of the many other attractions located in the County. This package should be designed for a party of three or four and marketed to the corporations identified in Step One.

Recommendations

On the basis of the research completed for this thesis, the following recommendations for further study are made:

1. Repeat the administration of the Orleans County Tourism Survey to the identical tourist markets to assess the validity and reliability of this research. Conducting the survey again will help identify to what extent the sample mean of the Orleans County Tourism markets approximates the true population mean. The means analysis of the Orleans County Tourism Survey identified the common demographic

characteristics, spending patterns and awareness of amenities of tourists visiting the County, however certain variables were not considered. It is recommended that the survey instruments be expanded to elicit information relating to the respondent's age, sex and date of visit.

Obtaining the respondents age and sex would substantiate the tourist demographic profile outlined in this Chapter as well as assist the County in directing it's advertising campaign to the appropriate markets.

Identifying Orleans County's high and low tourist season would enable the County to better approach the true estimated potential tax revenue generated from tourist dollars. The estimated annual tax revenue figures discussed in Chapter IV were based on the assumption that a consistent annual demand exists for the tourist amenities in the County.

It is also recommended that the survey instrument be divided into two sections based on the nature of the response. The first survey should attempt to identify the sociodemographic characteristics of the respondents, and thus be limited to questions pertaining to those

responses. The second survey should attempt to identify the spending patterns of tourists, and thus be limited to questions pertaining to such responses. The rationale for this recommendation comes from results of this research. The low response rate indicates that the original survey instruments were too lengthy and complicated.

2. Survey the visitors attracted to Orleans County to assess the level of quality service offered in the tourist amenities available to them. Further research should investigate the needs of tourists staying in Orleans County and determine if those needs are adequately satisfied with the existing facilities.
3. Survey the residents of Orleans County to assess their acceptance and receptiveness to the tourism efforts of the County. It is well documented that tourism success relies heavily on the support of the community. Further research should attempt to measure the County's overall support in terms of local businesses cooperation in developing a welcoming image through both advertising and physical appearance of all County establishments. The general attitudes of hospitality created by the service employees and local residents, should be observed as well.

4. Proceed with the next phase of the research upon identifying the demographic characteristics of the tourist markets attracted to Orleans County. This phase consists of analyzing the success of tourism advertising and promotional efforts of the County. This phase should attempt to determine if the advertising campaigns are directed at the appropriate markets defined by this current study.

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APPENDICES

APPENDIX A
Percentage Results of Responses to Survey Instruments

PERCENTAGE RESULTS

1.	Which of the following best describes your party?	<u>Percentage</u>
	Group of Friends	48.6
	Immediate Family	36.8
	Group of Relatives	7.7
	Traveling Alone	3.0
	Tour Member	2.2
	Business Associates	1.7
2.	How many persons, including yourself make up the party you selected in Question 1?	<u>Percentage</u>
	4 Persons	32.7
	2 Persons	18.7
	3 Persons	14.0
	5 Persons	10.1
	6 Persons	5.8
3.	In what city, state or province do you live?	<u>Percentage</u>
	Pennsylvania	42.2
	New York	21.8
	Ohio	15.4
	Massachusetts	3.9
	New Jersey	2.1
4.	What is your marital status?	<u>Percentage</u>
	Married	80.4
	Single	11.3
	Divorced	4.9
	Widowed	2.7
	Separated	.7
5.	How many children do you have?	<u>Percentage</u>
	2 Children	29.7
	0 Children	22.9
	3 Children	17.5
	1 Child	12.3
	4 Children	8.9
6.	Which of the following best describes your occupation?	<u>Percentage</u>
	Retired	19.7
	Professional	16.6
	Manager	11.9
	Self-Employed	9.8
	Manufacturing	9.6
7.	What is the main purpose of your stay in Orleans County?	<u>Percentage</u>
	Vacation	83.7
	A Specific Event	7.1
	Other	4.3
	Visit Family or Friends	3.5
	Business	1.4

8.	What was your intended length of stay in Orleans County?		
		<u>Percentage</u>	
	One to Three Days	36.9	
	Three to Five Days	31.8	
	Five to Seven Days	11.6	
	Less than One Day	11.1	
	More than One Week	8.2	
9.	Was Orleans County your primary destination or a stopover?		
		<u>Percentage</u>	
	Primary Destination	86.9	
	Stopover	12.9	
	If it was a stopover, what was your primary destination?		
		<u>Percentage</u>	
	New York	42.4	
	Canada	16.1	
	Maine	3.4	
10.	What was your accommodations in Orleans County?		
		<u>Percentage</u>	
	Campgrounds	38.7	
	Hotel or Motel	30.3	
	Bed and Breakfast	4.5	
	Not Staying in Orleans County	10.3	
	Family or Friends	3.5	
11.	What means of transportation did you use to reach Orleans County?		
		<u>Percentage</u>	
		<u>Yes</u>	<u>No</u>
	Personal Vehicle	95.2	4.8
	Bus	3.0	96.9
	Airplane	.6	99.4
	Rental Vehicle	1.6	98.4
	Train	.1	99.9
12.	What sources did you use to get information on Orleans County?		
		<u>Percentage</u>	
		<u>Yes</u>	<u>No</u>
	Mailed Request	25.1	74.9
	Magazine or Brochure	20.3	79.7
	Information Booth	9.5	90.5
	Family/Friends	48.9	51.1
	Travel Agent	1.8	98.2
	Automobile Club	4.9	95.1
	Orleans County Travel Guide	16.3	83.7
	Niagara Region Travel Guide	9.8	90.2
	No Sources Used	12.5	87.5
13.	Which of the following attractions are you aware of in Orleans County?		
		<u>Percentage</u>	
		<u>Yes</u>	<u>No</u>
	Canal Packet Boat Tour	16.0	84.0
	Eric Canal	32.7	67.3
	Apple Grove Inn	17.1	82.9
	Wildlife Refuges and Trails	14.2	85.8
	Historic Village Inn	14.0	86.0
	County Festivals	8.3	91.7

APPENDIX B
Cover Letters and Potential Market



COUNTY OF ORLEANS
DEPARTMENT OF
PLANNING AND DEVELOPMENT
TOURISM AGENCY

14016 Route 31
Albion, New York 14411
(716) 589-7004

AYNE HALE, JR.
Director

DONALD WHITE
Tourism Director

May 18, 1990

Dear Visitor:

It is appropriate that we chose National Tourism Week to solicit your help by taking a few minutes to respond to the enclosed survey.

You have been selected to participate in this study, along with several hundred other potential visitors, because you have requested information about Orleans County.

If you did in fact visit our County, we ask that you take a few minutes of your time to complete the survey. Please return it by week's end in the self-addressed, stamped envelope to Rochester Institute of Technology who is conducting this research for Orleans County. We guarantee that all the information will be held in the strictest of confidence.

The results of the survey will help us make your future visits to Orleans County satisfying and worthwhile experiences.

If you did not visit Orleans County, please return this cover letter and check "Did Not Visit" at the bottom of the page. Any comments you care to share on the back of the letter would be greatly appreciated as to why you didn't visit or if you have future plans to do so.

Should you have any questions, please contact this Tourism Office. Thank you.

Lyndon D. Billings
Orleans County Legislature Chairman

Don White
Director of Tourism

"Did Not Visit" _____



COUNTY OF ORLEANS
DEPARTMENT OF
PLANNING AND DEVELOPMENT
TOURISM AGENCY

14016 Route 31
Albion, New York 14411
(716) 589-7004

WAYNE HALE, JR
Director

DONALD WHITE
Tourism Director

June 8, 1990

Dear Visitor:

Recently we sent you a survey which will assist us in developing tourism in Orleans County.

If you have already completed the survey, please disregard this letter. We thank you for your cooperation in this important matter.

If not, we ask that you take a few minutes to complete the enclosed survey. Your response is vital to the success of this study. Please return the survey by the end of the week in the self-addressed stamped envelope to Rochester Institute of Technology who is conducting this research for Orleans County. We guarantee that all the information will be held in the strictest of confidence.

Should you have any questions, please contact this Tourism Office.

Thank you.

Lyndon D. Billings
Orleans County Legislature Chairman

Donald White
Director of Tourism

ORLEANS COUNTY TOURISM SURVEY

In an attempt to better understand the needs of tourists visiting Orleans County, we ask that you take a few moments to complete this survey. Your input is of tremendous importance to the study. Please read each question carefully. Once again, thank you for your time on this very important matter.

- 1) Which of the following best described your party? (Select one)

<input type="checkbox"/> immediate family	<input type="checkbox"/> group of relatives
<input type="checkbox"/> group of friends	<input type="checkbox"/> business associates
<input type="checkbox"/> tour member	<input type="checkbox"/> traveling alone

- 2) How many persons, including yourself made up the party you selected in Question 1?

- 3) In what city, state or province do you live?

_____ (City)	_____ (State or Province)	_____ (Zip code)
-----------------	------------------------------	---------------------

- 4) What is your marital status?

<input type="checkbox"/> single	<input type="checkbox"/> separated	<input type="checkbox"/> married
<input type="checkbox"/> divorced	<input type="checkbox"/> widowed	

- 5) Do you have children? ☐ Yes ☐ No If yes, how many? _____

- 6) Which of the following best describes your occupation? (Select only one)

<input type="checkbox"/> professional	<input type="checkbox"/> craftsmen
<input type="checkbox"/> manager/administration	<input type="checkbox"/> self-employed
<input type="checkbox"/> agriculture	<input type="checkbox"/> sales work
<input type="checkbox"/> manufacturing	<input type="checkbox"/> government
<input type="checkbox"/> student	<input type="checkbox"/> retired
<input type="checkbox"/> transportation	<input type="checkbox"/> clerical
<input type="checkbox"/> retail	<input type="checkbox"/> not employed
<input type="checkbox"/> other, please specify: _____	

_____.

- 7) What was the main purpose of your stay in Orleans County? (Select one)
- | | |
|---|--|
| <input type="checkbox"/> vacation | <input type="checkbox"/> visit friend/relative |
| <input type="checkbox"/> business | <input type="checkbox"/> a specific event |
| <input type="checkbox"/> other, please specify: _____ | |
- _____

- 8) What was your length of stay in Orleans County? (Select one)
- | | |
|---|--------------------------------------|
| <input type="checkbox"/> less than 1 day | <input type="checkbox"/> 1 to 3 days |
| <input type="checkbox"/> 3 to 5 days | <input type="checkbox"/> 5 to 7 days |
| <input type="checkbox"/> more than one week | |

- 9) Was Orleans County your primary destination?
- ☐ primary destination ☐ stopover

If it was a stopover, what was your primary destination?

(City) _____ (State or Province) _____

- 10) What were your accommodations in Orleans County? (Select one)
- | | |
|--|---|
| <input type="checkbox"/> campgrounds | <input type="checkbox"/> hotel/motel |
| <input type="checkbox"/> bed & breakfast | <input type="checkbox"/> family/friends |
| <input type="checkbox"/> not staying in Orleans County | |
- 11) What means of transportation did you use to reach Orleans County?
(Select as many that apply)
- | | |
|---|---|
| <input type="checkbox"/> personal vehicle | <input type="checkbox"/> rental vehicle |
| <input type="checkbox"/> bus | <input type="checkbox"/> train |
| <input type="checkbox"/> airplane | |

- 12) What sources did you use to get information on Orleans County?
(Select as many that apply)
- | | |
|--|--|
| <input type="checkbox"/> mailed request | <input type="checkbox"/> friends/relatives |
| <input type="checkbox"/> magazine/brochure | <input type="checkbox"/> travel agent |
| <input type="checkbox"/> information booth | <input type="checkbox"/> automobile club |
| <input type="checkbox"/> Orleans County Travel Guide | <input type="checkbox"/> Niagara Region Travel Guide |
| <input type="checkbox"/> no sources used | |

- 13) Which of the following attractions are you aware of in Orleans County?
(Select as many that apply)

<input type="checkbox"/> Canal Packet Boat Tour	<input type="checkbox"/> Cobblestone Museum
<input type="checkbox"/> Erie Canal	<input type="checkbox"/> Seaway Trail
<input type="checkbox"/> Apple Grove Inn	<input type="checkbox"/> Historic Court House Square
<input type="checkbox"/> Wildlife Refuges and Trails	<input type="checkbox"/> Scenic Waterway and Byways
<input type="checkbox"/> Historic Village Inn	<input type="checkbox"/> Historic Locations
<input type="checkbox"/> Festivals	<input type="checkbox"/> Boating
<input type="checkbox"/> Camping	<input type="checkbox"/> Fishing
<input type="checkbox"/> Hunting	<input type="checkbox"/> other, please specify : _____

- 14) Which of those attractions did you visit while in Orleans County?
(Select as many that apply)

<input type="checkbox"/> Canal Packet Boat Tour	<input type="checkbox"/> Cobblestone Museum
<input type="checkbox"/> Erie Canal	<input type="checkbox"/> Seaway Trail
<input type="checkbox"/> Apple Grove Inn	<input type="checkbox"/> Historic Court House Square
<input type="checkbox"/> Wildlife Refuges and Trails	<input type="checkbox"/> Scenic Waterway and Byways
<input type="checkbox"/> Historic Village Inn	<input type="checkbox"/> Historic Locations
<input type="checkbox"/> Festivals	<input type="checkbox"/> Boating
<input type="checkbox"/> Camping	<input type="checkbox"/> Fishing
<input type="checkbox"/> Hunting	<input type="checkbox"/> other, please specify: _____

- 15) What is your annual household income? (In U.S. Dollars)

<input type="checkbox"/> under \$20,000	<input type="checkbox"/> \$50,001 to \$60,000
<input type="checkbox"/> \$20,001 to \$30,000	<input type="checkbox"/> \$60,001 to \$70,000
<input type="checkbox"/> \$30,001 to \$40,000	<input type="checkbox"/> \$70,001 to \$80,000
<input type="checkbox"/> \$40,001 to \$50,000	<input type="checkbox"/> over \$80,001

- 16) What was your expense (In U.S. Dollars) for accommodations per day in Orleans County
(Campgrounds, Bed & Breakfasts, Hotel, Motel, etc...)

<input type="checkbox"/> less than \$15	<input type="checkbox"/> \$31 to \$45	<input type="checkbox"/> \$61 to \$75
<input type="checkbox"/> \$16 to \$30	<input type="checkbox"/> \$46 to \$60	<input type="checkbox"/> more than \$76
<input type="checkbox"/> [if on a tour, included in tour price]		

- 17) What was your expense (In U.S. Dollars) for food/meals per person, per day in Orleans County? (Breakfast, lunch and dinner)

<input type="checkbox"/> less than \$5	<input type="checkbox"/> \$11 to \$15	<input type="checkbox"/> \$21 to \$25
<input type="checkbox"/> \$6 to \$10	<input type="checkbox"/> \$16 to \$20	<input type="checkbox"/> more than \$25

- 18) What was your expense (In U.S. Dollars) for transportation per day in Orleans County? (Includes gas, tolls, etc.)
- | | | |
|---|-----------------------------------|-------------------------------------|
| <input type="text"/> less than \$5 | <input type="text"/> \$11 to \$15 | <input type="text"/> \$21 to \$25 |
| <input type="text"/> \$6 to \$10 | <input type="text"/> \$16 to \$20 | <input type="text"/> more than \$25 |
| <input type="text"/> [if on a tour, included in tour price] | | |
- 19) What was your expense (In U.S. Dollars) for attractions and events per person, per day in Orleans County? (Includes entrance fees, charter fees, licensing fees, etc.)
- | | | |
|---|-----------------------------------|-------------------------------------|
| <input type="text"/> less than \$5 | <input type="text"/> \$11 to \$15 | <input type="text"/> \$21 to \$25 |
| <input type="text"/> \$6 to \$10 | <input type="text"/> \$16 to \$20 | <input type="text"/> more than \$25 |
| <input type="text"/> [if on a tour, included in tour price] | | |
- 20) What was your expense (In U.S. Dollars) for personal items per person, per day in Orleans County? (Includes souvenirs, sundries, recreation equipment, etc.)
- | | | |
|---|-----------------------------------|-------------------------------------|
| <input type="text"/> less than \$5 | <input type="text"/> \$11 to \$15 | <input type="text"/> \$21 to \$25 |
| <input type="text"/> \$6 to \$10 | <input type="text"/> \$16 to \$20 | <input type="text"/> more than \$25 |
| <input type="text"/> [if on a tour, included in tour price] | | |
- 21) On a scale of 1 to 10, please rate your overall satisfaction with your stay in Orleans County. (One being the lowest possible score, ten being the highest).

THANK YOU FOR YOUR PARTICIPATION IN THIS SURVEY

APPENDIX C
Cover Letters and Historical Market Survey Instrument



COUNTY OF ORLEANS
DEPARTMENT OF
PLANNING AND DEVELOPMENT
TOURISM AGENCY

14016 Route 31
Albion, New York 14411
(716) 589-7004

WAYNE HALE, JR.
Director

DONALD WHITE
Tourism Director

June 8, 1990

Dear Visitor:

We have selected you and many others through the public and private tourism industries of Orleans County to respond to the enclosed survey.

Only by obtaining the opinions of actual visitors such as yourself can we accurately determine what we have been doing well and where we need improvement.

The results of the survey will help us assure that we will be offering the services necessary to make your future visits to Orleans County satisfying and worthwhile experiences. We guarantee that all the information will be held in the strictest of confidence.

The survey should take only a few minutes of your time to complete. Please return the survey by the end of the week in the self-addressed, stamped envelope to Rochester Institute of Technology who is conducting this research for Orleans County.

Should you have any questions, please contact this Tourism Office.

Thank you.

Lyndon D. Billings
Orleans County Legislature Chairman

Donald White
Director of Tourism



COUNTY OF ORLEANS
DEPARTMENT OF
PLANNING AND DEVELOPMENT
TOURISM AGENCY

14016 Route 31
Albion, New York 14411
(716) 589-7004

DONALD WHITE
Tourism Director

WAYNE HALE, JR
Director

June 29, 1990

Dear Visitor:

Recently we sent you a survey which will assist us in developing tourism in Orleans County.

If you have already completed the survey, please disregard this letter. We thank you for your cooperation in this important matter.

If not, we ask that you take a few minutes to complete the enclosed survey. Your response is vital to the success of this study. Please return the survey by the end of the week in the self-addressed stamped envelope to Rochester Institute of Technology who is conducting this research for Orleans County. We guarantee that all the information will be held in the strictest of confidence.

Should you have any questions, please contact this Tourism Office.

Thank you.

Lyndon D. Billings
Orleans County Legislature Chairman

Donald White
Director of Tourism

ORLEANS COUNTY TOURISM SURVEY

In an attempt to better understand the needs of tourists visiting Orleans County, we ask that you take a few moments to complete this survey. Your input is of tremendous importance to the study. Please read each question carefully. Once again, thank you for your time on this very important matter.

- 1) Which of the following best described your party? (Select one)

<input type="checkbox"/> immediate family	<input type="checkbox"/> group of relatives
<input type="checkbox"/> group of friends	<input type="checkbox"/> business associates
<input type="checkbox"/> tour member	<input type="checkbox"/> traveling alone

- 2) How many persons, including yourself made up the party you selected in Question 1?

- 3) In what city, state or province do you live?

_____ (City)	_____ (State or Province)	_____ (Zip code)
-----------------	------------------------------	---------------------

- 4) What is your marital status?

<input type="checkbox"/> single	<input type="checkbox"/> separated	<input type="checkbox"/> married
<input type="checkbox"/> divorced	<input type="checkbox"/> widowed	

- 5) Do you have children? ☐ Yes ☐ No If yes, how many? _____

- 6) Which of the following best describes your occupation? (Select only one)

<input type="checkbox"/> professional	<input type="checkbox"/> craftsmen
<input type="checkbox"/> manager/administration	<input type="checkbox"/> self-employed
<input type="checkbox"/> agriculture	<input type="checkbox"/> sales work
<input type="checkbox"/> manufacturing	<input type="checkbox"/> government
<input type="checkbox"/> student	<input type="checkbox"/> retired
<input type="checkbox"/> transportation	<input type="checkbox"/> clerical
<input type="checkbox"/> retail	<input type="checkbox"/> not employed
<input type="checkbox"/> other, please specify: _____	

7) What was the main purpose of your stay in Orleans County? (Select one)
☐ vacation ☐ visit friend/relative
☐ business ☐ a specific event
☐ other, please specify: _____
 _____.

8) What was your length of stay in Orleans County? (Select one)
☐ less than 1 day ☐ 1 to 3 days
☐ 3 to 5 days ☐ 5 to 7 days
☐ more than one week

9) Was Orleans County your primary destination?
☐ primary destination ☐ stopover

If it was a stopover, what was your primary destination?

 (City) (State or Province)

10) What were your accommodations in Orleans County? (Select one)
☐ campgrounds ☐ hotel/motel
☐ bed & breakfast ☐ family/friends
☐ not staying in Orleans County

11) What means of transportation did you use to reach Orleans County?
 (Select as many that apply)
☐ personal vehicle ☐ rental vehicle
☐ bus ☐ train
☐ airplane

12) What sources did you use to get information on Orleans County?
 (Select as many that apply)
☐ mailed request ☐ friends/relatives
☐ magazine/brochure ☐ travel agent
☐ information booth ☐ automobile club
☐ Orleans County Travel Guide ☐ Niagara Region Travel Guide
☐ no sources used

13) Which of the following attractions are you aware of in Orleans County?

(Select as many that apply)

☐ Canal Packet Boat Tour
☐ Erie Canal
☐ Apple Grove Inn
☐ Wildlife Refuges and Trails
☐ Historic Village Inn
☐ Festivals
☐ Camping
☐ Hunting

☐ Cobblestone Museum
☐ Seaway Trail
☐ Historic Court House Square
☐ Scenic Waterway and Byways
☐ Historic Locations
☐ Boating
☐ Fishing
☐ other, please specify : _____

14) Which of those attractions did you visit while in Orleans County?

(Select as many that apply)

☐ Canal Packet Boat Tour
☐ Erie Canal
☐ Apple Grove Inn
☐ Wildlife Refuges and Trails
☐ Historic Village Inn
☐ Festivals
☐ Camping
☐ Hunting

☐ Cobblestone Museum
☐ Seaway Trail
☐ Historic Court House Square
☐ Scenic Waterway and Byways
☐ Historic Locations
☐ Boating
☐ Fishing
☐ other, please specify: _____

15) What is your annual household income? (In U.S. Dollars)

<input type="checkbox"/> under \$20,000	<input type="checkbox"/> \$50,001 to \$60,000
<input type="checkbox"/> \$20,001 to \$30,000	<input type="checkbox"/> \$60,001 to \$70,000
<input type="checkbox"/> \$30,001 to \$40,000	<input type="checkbox"/> \$70,001 to \$80,000
<input type="checkbox"/> \$40,001 to \$50,000	<input type="checkbox"/> over \$80,001

16) What was your expense (In U.S. Dollars) for accommodations per day in Orleans County?
(Campgrounds, Bed & Breakfasts, Hotel, Motel, etc...)

<input type="checkbox"/> less than \$15	<input type="checkbox"/> \$31 to \$45	<input type="checkbox"/> \$61 to \$75
<input type="checkbox"/> \$16 to \$30	<input type="checkbox"/> \$46 to \$60	<input type="checkbox"/> more than \$76
<input type="checkbox"/> [if on a tour, included in tour price]		

17) What was your expense (In U.S. Dollars) for food/meals per person, per day in Orleans County? (Breakfast, lunch and dinner)

<input type="checkbox"/> less than \$5	<input type="checkbox"/> \$11 to \$15	<input type="checkbox"/> \$21 to \$25
<input type="checkbox"/> \$6 to \$10	<input type="checkbox"/> \$16 to \$20	<input type="checkbox"/> more than \$25

PLEASE TURN THE PAGE.

- 18) What was your expense (In U.S. Dollars) for transportation per day in Orleans County? (Includes gas, tolls, etc.)
- | | | |
|---|---------------------------------------|---|
| <input type="checkbox"/> less than \$5 | <input type="checkbox"/> \$11 to \$15 | <input type="checkbox"/> \$21 to \$25 |
| <input type="checkbox"/> \$6 to \$10 | <input type="checkbox"/> \$16 to \$20 | <input type="checkbox"/> more than \$25 |
| <input type="checkbox"/> [if on a tour, included in tour price] | | |
- 19) What was your expense (In U.S. Dollars) for attractions and events per person, per day in Orleans County? (Includes entrance fees, charter fees, licensing fees, etc.)
- | | | |
|---|---------------------------------------|---|
| <input type="checkbox"/> less than \$5 | <input type="checkbox"/> \$11 to \$15 | <input type="checkbox"/> \$21 to \$25 |
| <input type="checkbox"/> \$6 to \$10 | <input type="checkbox"/> \$16 to \$20 | <input type="checkbox"/> more than \$25 |
| <input type="checkbox"/> [if on a tour, included in tour price] | | |
- 20) What was your expense (In U.S. Dollars) for personal items per person, per day in Orleans County? (Includes souvenirs, sundries, recreation equipment, etc.)
- | | | |
|---|---------------------------------------|---|
| <input type="checkbox"/> less than \$5 | <input type="checkbox"/> \$11 to \$15 | <input type="checkbox"/> \$21 to \$25 |
| <input type="checkbox"/> \$6 to \$10 | <input type="checkbox"/> \$16 to \$20 | <input type="checkbox"/> more than \$25 |
| <input type="checkbox"/> [if on a tour, included in tour price] | | |
- 21) On a scale of 1 to 10, please rate your overall satisfaction with your stay in Orleans County. (One being the lowest possible score, ten being the highest). _____
- 22) How many times have you visited Orleans County? _____

THANK YOU FOR YOUR PARTICIPATION IN THIS SURVEY

APPENDIX D
Current Market Survey Instrument

WELCOME TO ORLEANS COUNTY !!!

In an attempt to better understand the needs of tourists visiting Orleans County, the Orleans County Tourism Department cordially asks you to take a few minutes of your time to complete this survey. Your response will help them assure they will be offering the services necessary to make your future visits to Orleans County satisfying and worthwhile experiences. They guarantee all the information will be held in the strictest of confidence.

Please read and answer every question carefully. The survey should be returned to the registration location, as soon as possible. Once again, thank you for your time on this very important matter.

- 1) Which of the following best describes your party? (Select one)

<input type="checkbox"/> immediate family	<input type="checkbox"/> group of relatives
<input type="checkbox"/> group of friends	<input type="checkbox"/> business associates
<input type="checkbox"/> tour member	<input type="checkbox"/> traveling alone

- 2) How many persons, including yourself make up the party you selected in Question 1?

- 3) In what city, state or province do you live?

_____ (City)	_____ (State or Province)	_____ (Zip code)
-----------------	------------------------------	---------------------

- 4) What is your marital status?

<input type="checkbox"/> single	<input type="checkbox"/> separated	<input type="checkbox"/> married
<input type="checkbox"/> divorced	<input type="checkbox"/> widowed	

- 5) Do you have children? ☐ Yes ☐ No If yes, how many? _____

- 6) Which of the following best describes your occupation? (Select only one)

<input type="checkbox"/> professional	<input type="checkbox"/> craftsmen
<input type="checkbox"/> manager/administration	<input type="checkbox"/> self-employed
<input type="checkbox"/> agriculture	<input type="checkbox"/> sales work
<input type="checkbox"/> manufacturing	<input type="checkbox"/> government
<input type="checkbox"/> student	<input type="checkbox"/> retired
<input type="checkbox"/> transportation	<input type="checkbox"/> clerical
<input type="checkbox"/> retail	<input type="checkbox"/> not employed
<input type="checkbox"/> other, please specify: _____	

PLEASE TURN THE PAGE

- 7) What is the main purpose of your stay in Orleans County? (Select one)
☐ vacation ☐ visit friend/relative
☐ business ☐ a specific event
☐ other, please specify: _____
 _____.
- 8) What is your intended length of stay in Orleans County? (Select one)
☐ less than 1 day ☐ 1 to 3 days
☐ 3 to 5 days ☐ 5 to 7 days
☐ more than one week
- 9) Is Orleans County your primary destination?
☐ primary destination ☐ stopover
 If it is stopover, what is your primary destination?

 (City) _____ (State or Province) _____
- 10) What are your accommodations in Orleans County? (Select one)
☐ campgrounds ☐ hotel/motel
☐ bed & breakfast ☐ family/friends
☐ not staying in Orleans County
- 11) What means of transportation did you use to reach Orleans County?
 (Select as many that apply)
☐ personal vehicle ☐ rental vehicle
☐ bus ☐ train
☐ airplane
- 12) What sources did you use to get information on Orleans County?
 (Select as many that apply)
☐ mailed request ☐ friends/relatives
☐ magazine/brochure ☐ travel agent
☐ information booth ☐ automobile club
☐ Orleans County Travel Guide ☐ Niagara Region Travel Guide
☐ no sources used

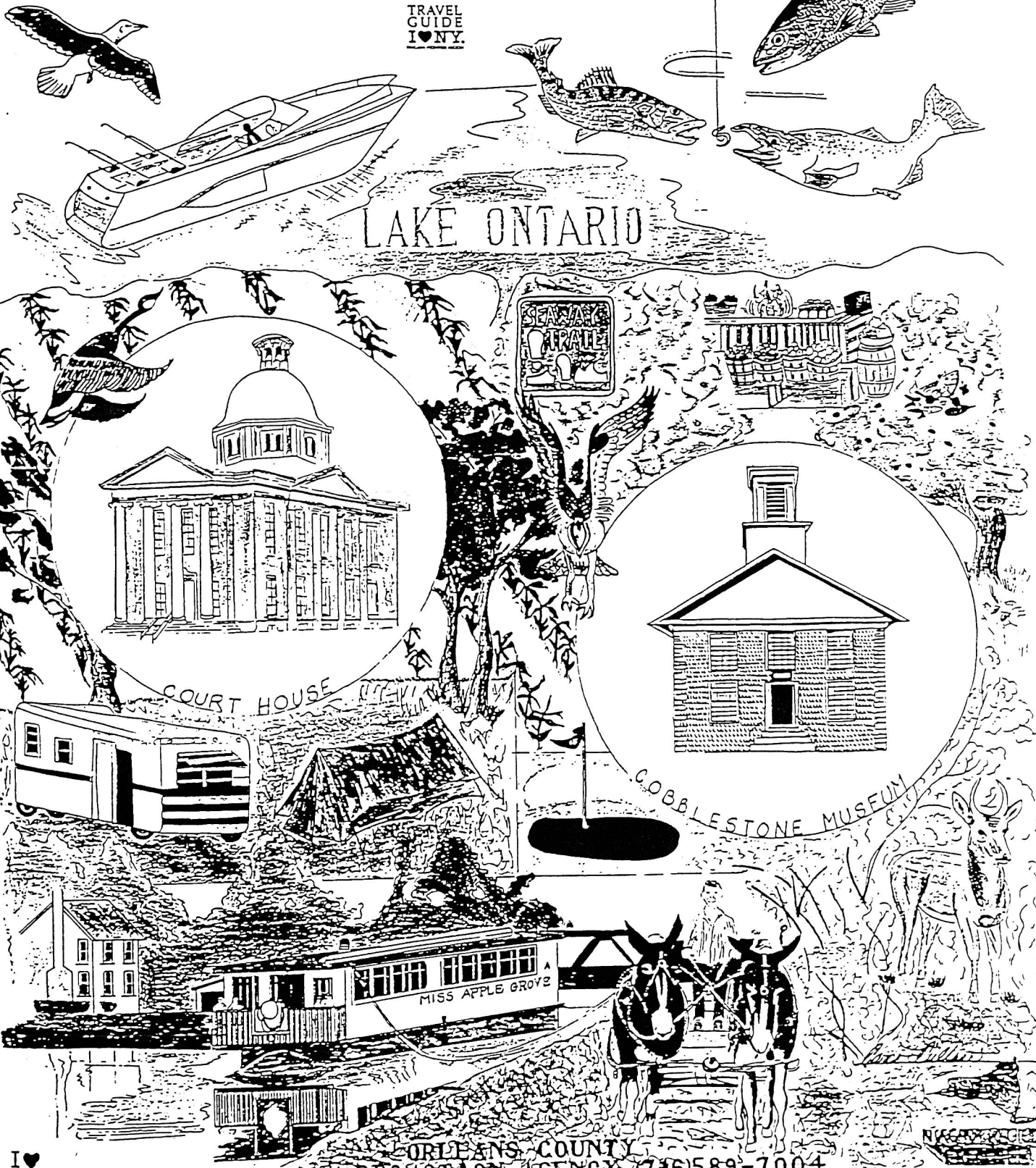
- 13) Which of the following attractions are you aware of in Orleans County?
(Select as many that apply)
- | | |
|--|---|
| <input type="checkbox"/> Canal Packet Boat Tour | <input type="checkbox"/> Cobblestone Museum |
| <input type="checkbox"/> Erie Canal | <input type="checkbox"/> Seaway Trail |
| <input type="checkbox"/> Apple Grove Inn | <input type="checkbox"/> Historic Court House Square |
| <input type="checkbox"/> Wildlife Refuges and Trails | <input type="checkbox"/> Scenic Waterway and Byways |
| <input type="checkbox"/> Historic Village Inn | <input type="checkbox"/> Historic Locations |
| <input type="checkbox"/> Festivals | <input type="checkbox"/> Boating |
| <input type="checkbox"/> Camping | <input type="checkbox"/> Fishing |
| <input type="checkbox"/> Hunting | <input type="checkbox"/> other, please specify: _____ |
-
- 14) Which of those attractions have you or will you visit while in Orleans County?
(Select as many that apply)
- | | |
|--|---|
| <input type="checkbox"/> Canal Packet Boat Tour | <input type="checkbox"/> Cobblestone Museum |
| <input type="checkbox"/> Erie Canal | <input type="checkbox"/> Seaway Trail |
| <input type="checkbox"/> Apple Grove Inn | <input type="checkbox"/> Historic Court House Square |
| <input type="checkbox"/> Wildlife Refuges and Trails | <input type="checkbox"/> Scenic Waterway and Byways |
| <input type="checkbox"/> Historic Village Inn | <input type="checkbox"/> Historic Locations |
| <input type="checkbox"/> Festivals | <input type="checkbox"/> Boating |
| <input type="checkbox"/> Camping | <input type="checkbox"/> Fishing |
| <input type="checkbox"/> Hunting | <input type="checkbox"/> other, please specify: _____ |
-
- 15) What is your annual household income? (In U.S. Dollars)
- | | |
|---|---|
| <input type="checkbox"/> under \$20,000 | <input type="checkbox"/> \$50,001 to \$60,000 |
| <input type="checkbox"/> \$20,001 to \$30,000 | <input type="checkbox"/> \$60,001 to \$70,000 |
| <input type="checkbox"/> \$30,001 to \$40,000 | <input type="checkbox"/> \$70,001 to \$80,000 |
| <input type="checkbox"/> \$40,001 to \$50,000 | <input type="checkbox"/> over \$80,001 |
- 16) What is your expected budget (In U.S. Dollars) for accommodations per day in Orleans County? (Campgrounds, Bed & Breakfasts, Hotel, Motel, etc...)
- | | | |
|---|---------------------------------------|---|
| <input type="checkbox"/> less than \$15 | <input type="checkbox"/> \$31 to \$45 | <input type="checkbox"/> \$61 to \$75 |
| <input type="checkbox"/> \$16 to \$30 | <input type="checkbox"/> \$46 to \$60 | <input type="checkbox"/> more than \$76 |
| <input type="checkbox"/> [if on a tour, included in tour price] | | |
- 17) What is your expected budget (In U.S. Dollars) for food/meals per person, per day in Orleans County? (Breakfast, lunch and dinner)
- | | | |
|--|---------------------------------------|---|
| <input type="checkbox"/> less than \$5 | <input type="checkbox"/> \$11 to \$15 | <input type="checkbox"/> \$21 to \$25 |
| <input type="checkbox"/> \$6 to \$10 | <input type="checkbox"/> \$16 to \$20 | <input type="checkbox"/> more than \$25 |

- 18) What is your expected budget (In U.S. Dollars) for transportation per day in Orleans County? (Includes gas, tolls, etc.)
- | | | |
|---|-----------------------------------|-------------------------------------|
| <input type="text"/> less than \$5 | <input type="text"/> \$11 to \$15 | <input type="text"/> \$21 to \$25 |
| <input type="text"/> \$6 to \$10 | <input type="text"/> \$16 to \$20 | <input type="text"/> more than \$25 |
| <input type="text"/> [if on a tour, included in tour price] | | |
- 19) What is your expected budget (In U.S. Dollars) for attractions and events per person, per day in Orleans County? (Includes entrance fees, charter fees, licensing fees, etc.)
- | | | |
|---|-----------------------------------|-------------------------------------|
| <input type="text"/> less than \$5 | <input type="text"/> \$11 to \$15 | <input type="text"/> \$21 to \$25 |
| <input type="text"/> \$6 to \$10 | <input type="text"/> \$16 to \$20 | <input type="text"/> more than \$25 |
| <input type="text"/> [if on a tour, included in tour price] | | |
- 20) What is your expected budget (In U.S. Dollars) for personal items per person, per day in Orleans County? (Includes souvenirs, sundries, recreation equipment, etc.)
- | | | |
|---|-----------------------------------|-------------------------------------|
| <input type="text"/> less than \$5 | <input type="text"/> \$11 to \$15 | <input type="text"/> \$21 to \$25 |
| <input type="text"/> \$6 to \$10 | <input type="text"/> \$16 to \$20 | <input type="text"/> more than \$25 |
| <input type="text"/> [if on a tour, included in tour price] | | |
- 21) On a scale of 1 to 10, please rate your overall satisfaction with your stay in Orleans County. (One being the lowest possible score, ten being the highest).
- 22) Including this stay, how many times have you visited Orleans County?

THANK YOU FOR YOUR PARTICIPATION IN THIS SURVEY

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TOURISM PROMOTION AGENCY (716) 589-7004